DOCUMENT RESUME

ED 444 012 CE 080 581

AUTHOR	Morrow, Cherie
TITLE	Reading for Information: Targets for Learning. Teaching Workplace Reading Skills.
INSTITUTION	Ohio State Univ., Columbus. Center on Education and Training for Employment.
PUB DATE	2000-00-00
NOTE	275p.; For other guides in this series, see ED 418 251-252 and CE 080 580.
AVAILABLE FROM	Center on Education and Training for Employment, 1900 Kenny Road, Columbus, OH 43210-1090, Tel: 800-848-4815, ext. 24277, Fax: 614-292-1260, Web site: http://www.cete.org/products (TLRI, $35).
PUB TYPE	Guides - Classroom - Teacher (052)
EDRS PRICE	MF01/PC11 Plus Postage.
DESCRIPTORS	Adult Education; *Functional Reading; *Information Literacy; Instructional Materials; *Job Skills; Learning Activities; Learning Modules; Postsecondary Education; *Reading Skills; Secondary Education; Teaching Guides; Teaching Methods; Vocational Education; Workplace Literacy
IDENTIFIERS	*Work Keys (ACT)

ABSTRACT

Part of a series of instructor guides designed to support Ohio's ACT Work Keys System, this book addresses the skills required to read and understand the kinds of documents used in the workplace and to apply the information they contain in performing job tasks. It is for teachers, tutors, parents, mentors, and trainers seeking strategies for preparing people to apply reading skills to real-life situations at home and in the workplace. Learning activities are designed for learners in secondary, postsecondary, and adult training situations. The book supplements the curriculum; its learning activities reinforce basic reading skills and provide practice in each level of the Work Keys Reading for Information profile. Section 1 contains background information about the ACT Work Keys system and Reading for Information. A detailed explanation of the Reading for Information skill set and why learners need these skills is included. Section 2 contains information and exercises that help build technical expertise in Reading for Information instruction. Topics include workplace documents, leveling, and teaching tools/strategies. Section 3, the largest section, contains learning activities and practice problems organized by Reading for Information level. Appendixes include annotated lists of 10 resources and 4 Work Keys-related resources and assessment background knowledge and tools. (YLB)

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TARGETS FOR LEARNING

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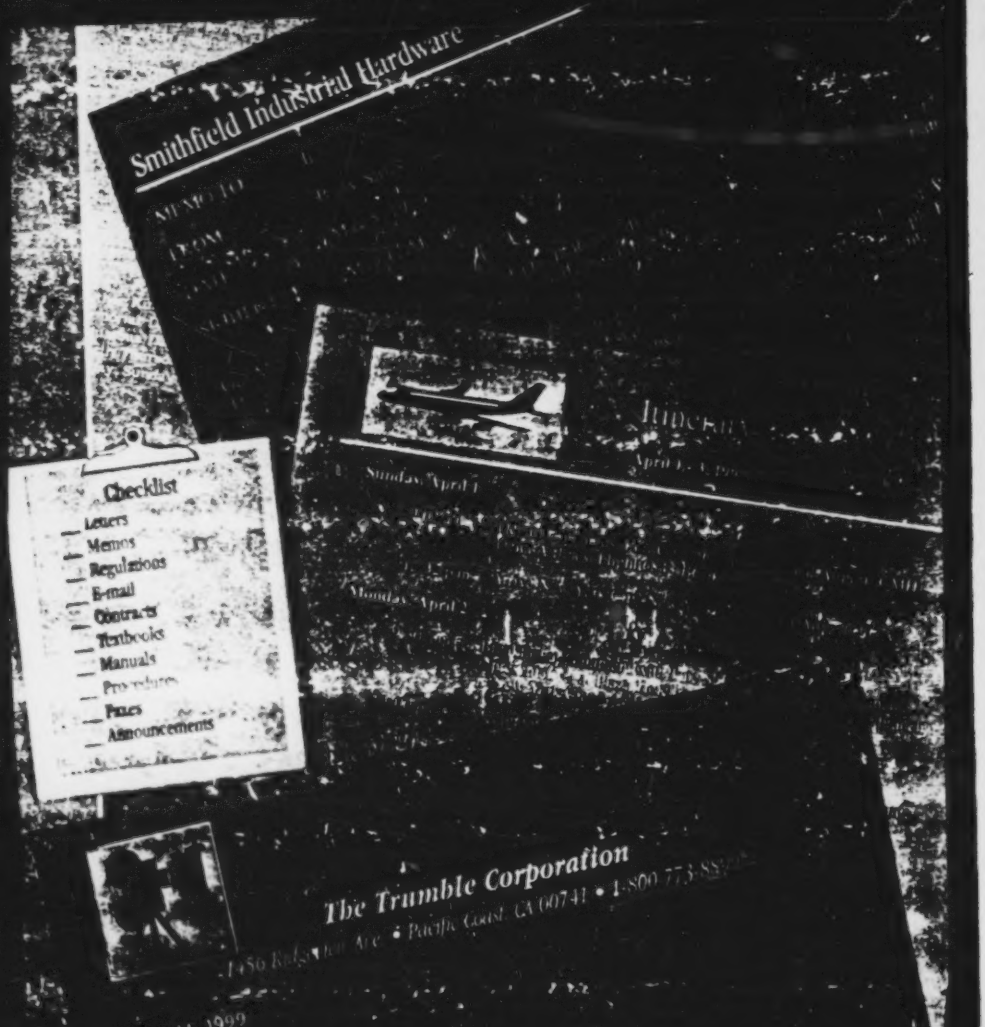

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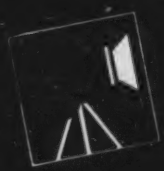

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Acknowledgments

Our sincere thanks to the professionals who devoted their time and expertise to help make this book a useful resource for anyone who wants to give learners opportunities to conduct practical, authentic reading activities.

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Insert the "About Reading for Information" Divider Here

About This Book

Reading for Information is part of the *Targets for Instruction* series that is published by The Ohio State University's Vocational Instructional Materials Laboratory. It addresses **skills required to read and understand the kinds of documents used in the workplace, and to apply the information they contain in performing job tasks**.

Like others in the series, this book supports the skills criteria contained in the ACT Work Keys system*. Specifically, the **Reading for Information skill scale** includes the ability to:

- Identify the main theme and supporting points in a document.
- Accurately define words, including technical terms.
- Follow instructions by sequencing and generalizing information.
- Use logic and reason to understand the purposes for the document (e.g., company policy) and/or the consequences of applying the information.

The section titled "What is Reading for Information?" (pp. 7–9) provides detailed information about the Reading for Information skill set, including a table summary for quick reference.

The fundamental goal of *Targets for Learning: Reading for Information* is to address the skills required to read and use workplace documents by providing a variety of tools and learning activities that help learners overcome the tendency to mentally shut down when confronted with difficult reading tasks.

**A summary description of the Work Keys system is provided on p. 6. The goals of the* Targets *series can be found in Appendix B, along with information about other books in the series.*

How Do I Use This Book?

Reading for Information was developed for **anyone** (e.g., teachers, industry trainers, tutors, parents, mentors) seeking strategies for preparing people to **apply reading skills to real-life situations**, both at home and in the workplace. It can be used by formally trained reading instructors or people with no formal training. The learning activities were designed for learners in secondary, post-secondary, and adult training situations; however, they can be adapted easily for younger students.

This book is not a complete curriculum. Rather, it supports what instructors are already doing by offering ideas and materials for achieving their current learning goals and objectives. It **supplements a curriculum**. The learning activities were designed to **reinforce** basic reading skills and **provide practice** in each level of the Work Keys Reading for Information profile (outlined in the table on p. 19). In addition, all learning activities in this book focus on preparing learners to meet current and changing challenges in the workplace.

You will find *Reading for Information* flexible, easy, and efficient to use. It was published in a 3-ring binder format so users can:

- Change the order of activities to meet learners' needs.
- Add materials from other sources.
- Include professional notes about instructional strategies, concepts, and processes involved in Reading for Information.

In addition, strategies such as the use of descriptive headings and graphics, limiting explanations to essential information, and organizing information in a logical flow put the book's ideas at your fingertips and help you apply them. The following Road Map section explains and illustrates these strategies.

Preparation content. This book contains limited "front matter." Only information that is absolutely necessary to prepare instructors to use the learning activities has been included. The preparation knowledge is organized in two sections, as described below.

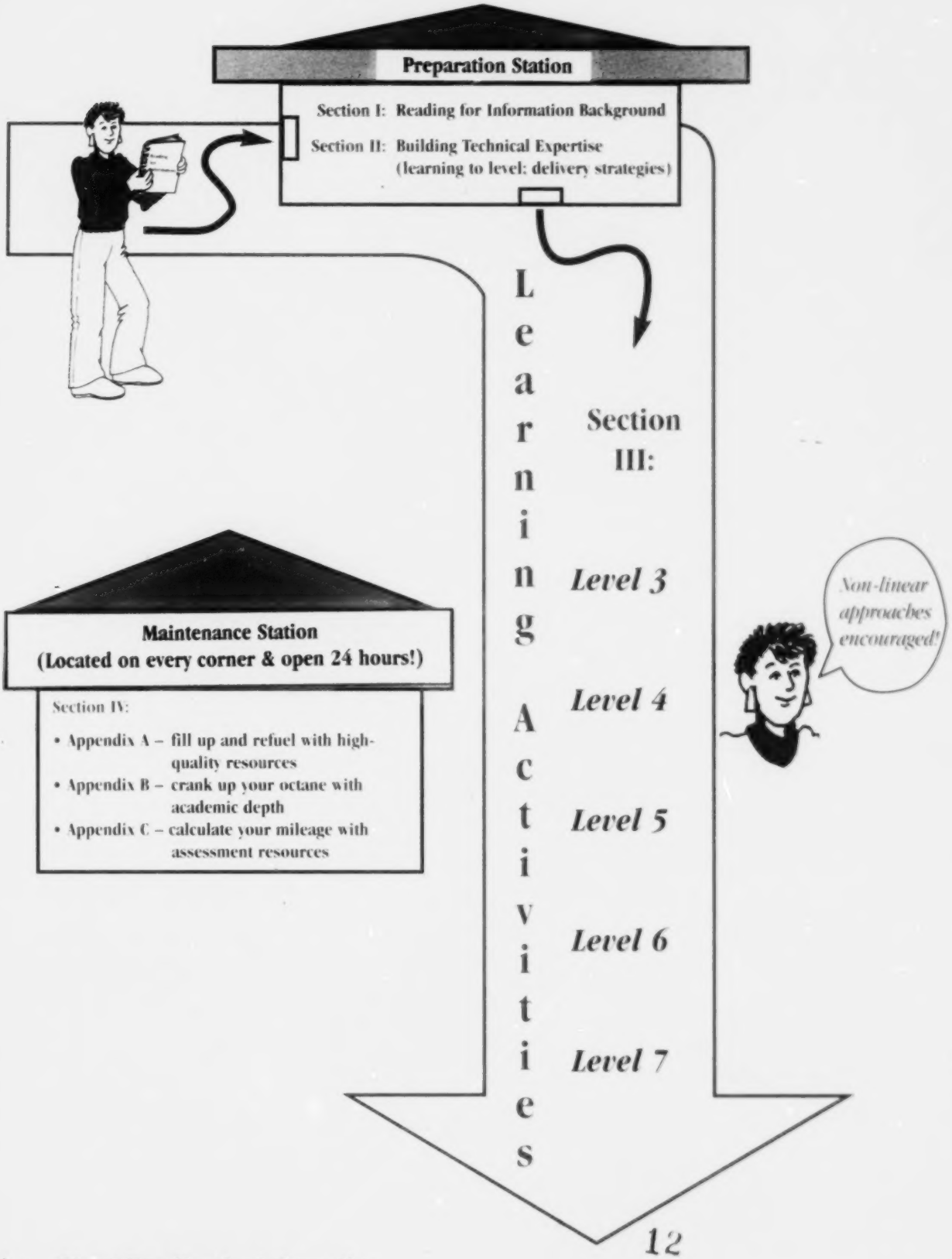
- **Section I** contains **background** information about the ACT Work Keys system and Reading for Information. A detailed explanation of the Reading for Information skill set and why learners need these skills is included.

- **Section II** contains information and exercises that will help you build **technical expertise** in Reading for Information instruction. Topics include workplace documents, leveling, and teaching tools/strategies. The hands-on learning about **workplace documents** and **leveling** activities provided in this section will help you customize your favorite lessons to learners' current skill goals, as well as choose or create exercises that directly address the proficiency levels/skills you want to target. In addition, comprehensive information about **teaching tools/strategies** that work well with reading instruction is organized for quick and easy reference as you adapt and integrate activities into your curriculum.

Activities. The largest portion of the book is **Section III**. It contains **learning activities and practice problems**, organized by Reading for Information level.

Appendices. Instructors will find supporting instructional resources such as a list of books recommended by our contributors, Work Keys-related information, and assessment tools in **Section IV: Appendices**.

The road map on the next page illustrates the tools offered in this book and their organization.


Preparation Station
Section I: Reading for Information Background
Section II: Building Technical Expertise
(learning to level: delivery strategies)
Learning Activities
Section III:
Level 3
Level 4
Level 5
Level 6
Level 7
Maintenance Station
(Located on every corner & open 24 hours!)
Section IV:
• Appendix A – fill up and refuel with high-quality resources
• Appendix B – crank up your octane with academic depth
• Appendix C – calculate your mileage with assessment resources
Non-linear approaches encouraged!
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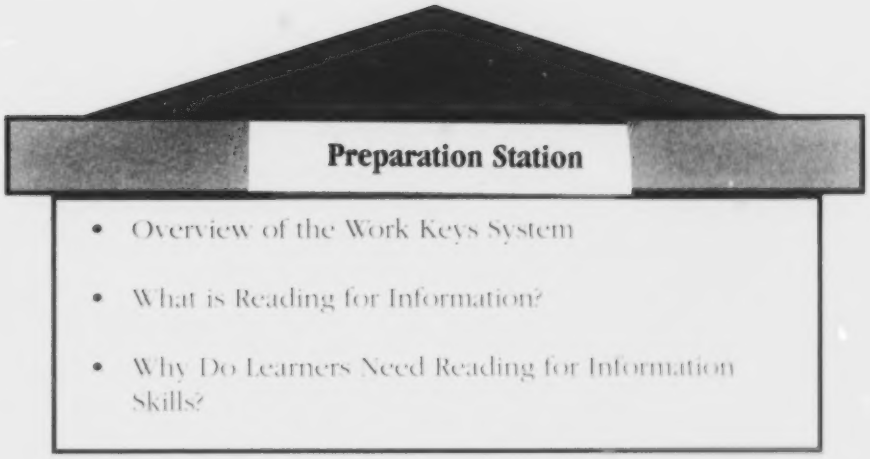

Preparation Station
• Overview of the Work Keys System
• What is Reading for Information?
• Why Do Learners Need Reading for Information Skills?

Overview of the Work Keys System

Work Keys is **a national system for assessing and teaching workplace academic skills** in secondary, post-secondary, and adult training programs. It was developed by American College Testing (ACT) to help instructors and employers measure the skill levels of learners. In addition, Work Keys gives all involved parties (e.g., instructors, learners, employers, parents, tutors) a common language for understanding and discussing the skills and skill levels required to successfully perform specific jobs.

The heart of the Work Keys system is its skill scales. Currently, **Work Keys covers eight skill areas**: Reading for Information, Locating Information, Applied Mathematics, Teamwork, Listening, Writing, Observation, and Applied Technology. Each topic is described in detail in corresponding *Targets for Instruction* books published by ACT.

Work Keys skill scales are divided into hierarchical proficiency levels. Business people and educators defined the levels. By design, successive levels encompass skills included in prior levels in the scale, providing constant skill expansion and reinforcement.

The Work Keys system contains **three components**:

- **Profiling** uses job analysis to identify the skills and the skill levels that are needed to succeed in **specific jobs or occupations**.

- **Assessments** measure the **individual's** skill levels. They are developed by ACT and administered by schools and Work Keys satellite centers. In Ohio, adult vocational full-service centers serve as the primary satellite centers. In most other states, satellite centers are located on community college campuses.

- **Instructional support** helps instructors supplement and reinforce their existing curriculum and teaching strategies to address workplace requirements more directly. ACT published their *Targets for Instruction* series to provide guidelines for developing effective interventions for learners who need to improve their skill levels. Those guidelines were followed by the authors of the *Targets for Learning* series.

All of the ACT *Targets for Instruction* books can be purchased through The Ohio State University's Center on Education and Training for Employment by calling 800/848-4815 or 614/292-8300.

If you need additional information about Work Keys, don't hesitate to contact ACT directly at 800/553-6244.

What is Reading for Information?

The Work Keys Reading for Information skill set addresses the skills required to read and understand the kinds of documents used in the workplace, and to apply the information they contain in performing job tasks. Therefore, the strategies and activities found in this book were designed not only to help learners **derive meaning** from what they read but also **apply** what they read. *The ability to appropriately apply written information is one of the most useful skills a worker can obtain* because it underlies all planning, analysis, and problem-solving tasks—tasks increasingly demanded in all jobs and at all job levels.

Skills involved in Reading for Information fall into four **skill categories**, as described below.

- **Identifying the main idea and supporting details**. Workplace documents typically do not follow common grammatical construction. For example, the topic sentence may fall in the middle of a paragraph instead of at the beginning. Therefore, Reading for Information skills focus on helping learners use *clues other than placement* to find the main idea and supporting details.

- **Understanding word meanings**. While Reading for Information skills include some basic vocabulary, the emphasis is on *contextual meaning*. Learners progress from simple words that are clearly stated in the document to using context to define more difficult words, including jargon, technical terms, and words with multiple meanings.

- **Applying instructions**. The goal of many workplace documents is to provide instructions. The Reading for Information skill set focuses on *sequencing* and *generalizing* so learners can gain skill in applying instructions. At lower levels, learners apply simple instructions in clearly stated circumstances. They progress to instructions with more steps and conditionals, applying them in similar, then new, situations.

- **Applying information and reasoning**. As market competition increases, companies increasingly expect even entry-level workers to apply information and reasoning to job tasks. This skill category prepares learners for these workplace challenges by directing them to *assimilate knowledge* gained in one area to similar or new situations, *predict consequences*, and *identify the reasoning* behind procedures and policies.

The Reading for Information skill set is outlined by content category and proficiency level in the table on p. 9.

Note: The information contained in both the table and the preceding bullets was summarized from ACT's book, *Targets for Instruction, Reading for Information* which provides more detailed information about and sample learning activities for each level. You may wish to examine the ACT book to gain additional insights about Work Keys and Reading for Information.

A Simple But Important Difference

At first glance *Reading for Information* and *Locating Information* may appear to deal with similar skills. It is very important to recognize the difference between them, however, because the skills required to *read for* information differ dramatically from those required for *locating* information. Simply remember that **Reading for Information deals with narratives** (e.g., letters, memorandums, legal documents, manuals), while **Locating Information gleans information from graphics** (e.g., charts, graphs, maps, forms). So, if the document is *narrative*, you are about to exercise Reading for Information skills.

Don't let the forms category confuse you. **Forms are considered Locating Information** because they are graphic in nature, containing mostly lines or boxes to fill in and limited text (e.g., telephone messages, menus, applications). But what about highly complex, narrative "forms" like real estate purchase contracts and automobile loan agreements? Although people sometimes call them *forms*, these documents are actually *contracts*. Remember this quick visual cue: If it contains lengthy narrative and few spaces for completion, it's *not* a form so you are dealing with Reading for Information skills.

Reading for Infor

Level	Description		
		Identifying Main Ideas & Supporting Details	**Underst Me**
Level 3	• Short, direct passage • Elementary vocabulary • Information clear & complete	Identify main idea & supporting details	• Recognize word(s) • Recognize not defined position, ti • Define wor (basic, not
Level 4	Level 3 skills plus: • Longer, more detailed & complex passage • Clear information; multiple factors to be considered • Elementary vocabulary that is slightly more difficult	Identify less obvious and/or embedded details; combine details	Use context t words not de
Level 5	Level 4 skills plus: • More detailed & complex passage • Covers broader topics	Same as Level 4, using more complex text	• Define tech acronyms, context, ap • Use contex words with
Level 6	Level 5 skills plus: • Significantly more difficult text • Advanced vocabulary • Information not clearly stated	Extract & synthesize important information to find implied details	• Use critica define tech that are us • Use contex common m meaning w
Level 7	Level 6 skills plus: • Difficult & dense text • Complex concepts • Difficult vocabulary	Same as Level 6, using more difficult & dense text like regulatory and legal documents	• Use contex mon techn • Isolate mea ating amon choosing m

Important! If a learner is unable to achieve Level 3, confirm your assessment's accura learner's second language) before instruction.

nation Skill Set

Skill Categories		
anding Word eanings	**Applying Instructions**	**Applying Information & Reasoning**
meaning of defined meaning of word(s) that show order, ne s-related words job-specific)	• Involves few and uncomplicated steps • Determine what to do and when	N/A
find meanings of ined	• Involves several steps & complicated instructions; may include conditionals • Order steps, consider cause-effect relationships, & select correct action	Consider changing circumstances in making a decision for a described situation
nical terms, jargon, & rom paraphrasing/ ly them correctly to correctly define multiple meanings	Involves more steps &/or details; more variables; includes conditionals	Apply information to a similar, but undescribed situation
thinking skills to nical terms & jargon d out of context to find the less eaning of multi-ord(s)	Same as Level 5, using more complicated text	• Apply complicated information to new situations • Determine general principles & rationale behind principles; generalize to related situations
to define uncom-cal terms & jargon anings by discrimin-g context clues, ost important	Same as Level 6, using denser, complicated text	Determine general principles & generalize to unrelated & undescribed situations

cy, then check for and remediate special problems (e.g., learning disability, English is

Why Do Learners Need Reading for Information Skills?

A significant body of research exists concerning reading skills in the workplace. As explained below, the research indicates the existence of a two-fold problem:

- Applicants demonstrate an increasing lack of the most basic reading skills.
- Businesses report an increasing need for higher reading skills (among others) to survive increased market competition.

Giving learners instruction in Reading for Information addresses both parts of the reading skills problem identified in the research.

Applicant problems. Companies report mounting difficulties with worker recruitment from a decrease in applicants' basic skills, including reading. One vice president of manufacturing for an appliance producer said, "We're all **suffering from applicant shock**...I get...people who cannot even fill out the application form, let alone follow instructions when they are hired." A variety of social factors, over which most instructors have no control, have contributed to this reduction in basic skill levels.

Market competition. Businesses are demanding both **different** and **increased** reading skills. Research conducted by the American Management Association concluded that the ability to *receive*, *understand*, and *act upon* written information is an increasingly critical skill set for workers in every segment of the workforce. In addition, workers must take on more responsibility if businesses are to remain competitive. Gone are the days when workers could mindlessly install their widgets and let someone else check the quality, worry about the bigger picture, and solve any problems. To stay solvent today, businesses must increase efficiency through workers' efforts. Every worker must recognize and solve problems, identify and implement process improvements, collaborate, remain flexible, and use technology—all tasks that require workers to do more reading and more complex reading. The success of these changing worker requirements depends upon the worker's ability to process information—to read it and use it.

Inadequate Reading Skills—Everyone Loses

Inadequate reading skills negatively impact everyone, from businesses to workers to consumers.

- **Businesses suffer increased operating costs** from accidents, quality problems, lost production, and recruitment and retention problems. For example, a clerk working in the company's home office sends instructions that contain errors to regional offices. The instructions must be recalled, corrected, and resent. More importantly, safety, quality, and/or production errors that occurred before the mistake was found must be caught and corrected. Depending upon the type of business and the delay involved, this mistake could cost a company from a few hundred to millions of dollars. Or what if a production worker measures some raw materials incorrectly because he cannot adequately read or process the information contained in his job standards manual? At the very least, his company will suffer hundreds of dollars in production waste.

- **Workers suffer career stagnation and lower salaries**. In the examples cited in the preceding paragraph, both workers are likely to suffer poor job performance ratings and may receive fewer and lower pay raises. They could even lose their jobs.

- **Consumers** like you and me suffer too. We **pay more for goods and services**. And with ever-increasing frequency, we experience "consumer shock" over unbelievably poor service.

While fictional, the examples cited represent business reality. One study of literacy in the workforce conducted by The Conference Board stated that 63% of member companies in the National Association of Printers and Lithographers report serious materials losses caused by press operators who cannot interpret simple directions (*Literacy in the Workforce*, The Conference Board, 1990, New York, NY). A joint study of the U.S. Departments of Labor and Education found that 30% of firms surveyed said secretaries could not read at the level required by their assignments. Additionally, 67% of the firms stated that the lack of basic literacy skills limits their workers' employment opportunities.

Does Reading for Information Replace Traditional Reading Instruction?

Reading for Information does not replace traditional reading instruction. Remember that **Reading for Information focuses on workplace documents**. Job "literature" can be poorly written, ambiguous, and down right confusing! Learners often mentally shut down when confronted with such reading tasks. Most traditional reading programs, including typical K–12 English classes, focus on reading for pleasure and cultural awareness (e.g., literature classics, contemporary commentaries), using texts that are well-written and professionally edited. While such reading materials provide excellent writing examples that help readers recognize correct language techniques, they also limit the learner's ability to acquire the skills needed to deal with poorly written workplace documents.

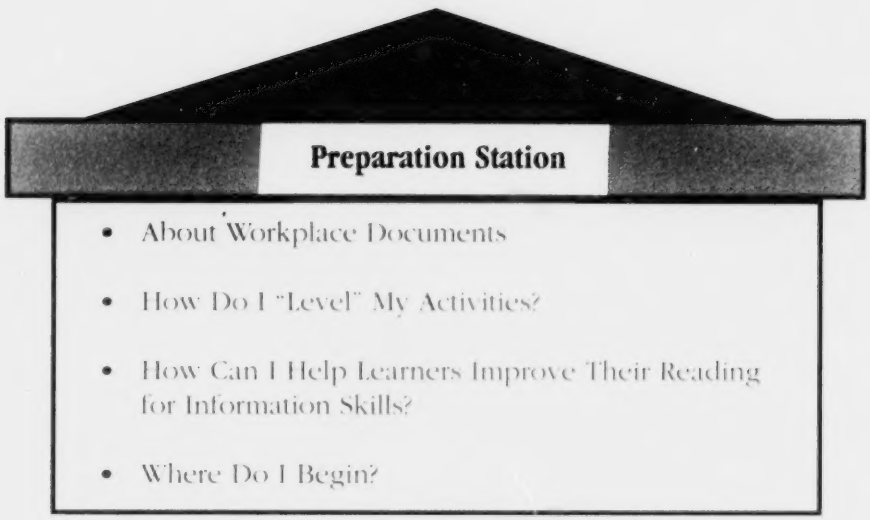
However, this situation does not mean that instructors have been teaching reading skills incorrectly nor does it mean that they should stop providing traditional reading instruction. **For social reasons alone**, learners must continue to study classic and contemporary literature. In addition, learners need these well-written examples, coupled with strong traditional grammar instruction, to prepare them to construct correct and clear documents in their jobs. Only with this solid preparation can they contribute to the overall improvement of workplace writing.

Therefore, rather than replace traditional reading instruction methods, you should:

- **Adapt** your course materials to focus from the start on real-life workplace reading experiences that use workplace documents. (The learning activities and documents in this book can help you get started.)
- **Integrate** traditional instruction in the specific skills learners lack into your workplace-focused curriculum.

Such program design helps learners construct meaning about the reading skills they are developing. The bottom line is: *Learners who are given strong traditional reading and grammar skills in a workplace-focused context are uniquely equipped to read and use information effectively in their workplaces.*

Section II: Building Technical Expertise


Preparation Station
• About Workplace Documents
• How Do I "Level" My Activities?
• How Can I Help Learners Improve Their Reading for Information Skills?
• Where Do I Begin?

About Workplace Documents

Learners will need to handle a wide variety of documents on the job. Depending upon the type of work they do, some will handle only letters, memoranda, and electronic communication. Others will deal with manuals, policies, and complex contracts. Most, if not all, will need to read and use information contained in company bulletins and policies. And these examples name only a few of the types of workplace documents learners will encounter. A broader overview of the kinds of documents most learners will experience in the workplace and the jobs that use them can be found in the Reading in the Workplace Exercise on p. 15.

As discussed earlier, many of the documents learners will find in the workplace lack clarity and are poorly written. Thus, it is especially important for instructors to give learners plenty of practice with real-life workplace documents. The learning activities in *Reading for Information* provide several examples of these documents, but **don't stop there**. Collect workplace documents that are relevant to your learners—relevance will help motivate them to improve their reading skills. Here are a few ideas for collecting relevant workplace documents:

- Look at the documents in your life through a Reading for Information lens. For example, announcements, bulletins, and letters abound in school, community, and home settings.
- Make specific requests of friends and colleagues for documents used in the higher proficiency levels (e.g., legal contracts, policy manuals).

Hint: Whenever possible, use original documents rather than photocopies. As one contributor put it, "There is something about using the actual document that learners really like." Learners' motivation and retention tends to increase as the realism in their learning experiences increases.

- Visit your local chamber of commerce, library, state house, and similar public places to collect real workplace documents. Once you explain the purpose of your mission, you may be surprised at workers' willingness to help you!
- Both adult and high school learners can be asked to bring in workplace materials. Having learners locate and use their own documents is one of the best ways to spark their interest and motivate them to improve their Reading for Information skills.
- If you instruct high school students, send a written request to parents for documents from their workplaces (assuring them of confidentiality, of course).

Hint: You may wish to use the exercise on the next page to ***introduce*** *learners to the Reading for Information subject matter and to help* ***motivate*** *them to acquire the reading skills they will need to succeed on the job.*

The collection methods and sources are endless, but those listed should stimulate your thinking. **Important!** Be prepared to reassure people that you are happy to protect their documents and businesses by adapting them (retyping them, removing confidential information) or adding a copyright cite. Carry examples of both protection methods so you can educate those who may be unfamiliar with such matters and demonstrate your commitment to protecting contributors.

Reading in the Workplace Exercise

Instructions: The job titles and documents listed are only a sampling of thousands found in the workplace. Still, completing this worksheet will give you a sense of the types of documents handled in different jobs. For each workplace document listed, write the letter of the jobs that **most frequently** use the document. Some documents will match with more than one job title.

A. Air Traffic Controller	J. District Attorney	S. Nurse
B. Every Worker	K. Doctor	T. Receptionist
C. Assembler	L. Electrical Engineer	U. Robot Operator
D. Automotive Technician/ Mechanic	M. Fast Food Grill Cook	V. Salesperson
	N. Finance Manager	W. Tax Accountant
E. C.E.O.	O. Foreman	X. Telephone Operator
F. Chef	P. Insurance Claims Adjuster	Y. Truck Driver
G. Construction Worker		Z. Waitress
H. Day Care Teacher	Q. Legal Secretary	
I. Department Head	R. Meter Reader	

_____ Accident Incident Report

_____ Accounting Practices Manual

_____ Annual Business and Budget Plan

_____ Appliance Operating Instructions

_____ Attendance Policy

_____ Automobile Operating Manual

_____ City Code

_____ Claims Procedure

_____ Company Newsletter

_____ Company Party Announcement

_____ E-mail Correspondence

_____ Employment Advertisement

_____ Health Insurance Benefits Description

_____ Heavy Equipment Manual

_____ Internet Data (e.g., product descriptions, abstracts, articles)

_____ Job Description

_____ Job Procedure

_____ Job Training Materials

_____ Letter Memorandum

_____ Medical Report

_____ Medical Textbook

_____ Mortgage or Personal Loan Agreement

_____ Notice of Personnel Change

_____ Office Equipment Manual (e.g., fax, copier, computer)

_____ Professional Journal for the Food Service Industry

_____ Profit & Loss Report

_____ Recipe

_____ Safety Regulation

_____ Supplier Contract

_____ Tax Guide

_____ Travel and Business Expense Policy

List any occupations you can think of that require **no reading**:

Reading in the Workplace Exercise Answers

O, P, S	Accident Incident Report
N, W	Accounting Practices Manual
E, I, N	Annual Business and Budget Plan
E, M, Z	Appliance Operating Instructions
B	Attendance Policy
D	Automobile Operating Manual
G, J, R	City Code
K, P, S	Claims Procedure
B	Company Newsletter
B	Company Party Announcement
E, I, J, K, L, N, O, P, Q, S, T, V, W, X	E-mail Correspondence
B	Employment Advertisement
B	Health Insurance Benefits Description
C, D, G, U, V	Heavy Equipment Manual
J, K, L, P, Q, V	Internet Data (e.g., product descriptions, abstracts, articles)
B	Job Description
B	Job Procedure
A, E, H, L, M, U, V, X, Z	Job Training Materials
A, E, H, I, J, K, L, N, P, Q, S, T, V	Letter/Memorandum
K, S	Medical Report
K, S	Medical Textbook
N, Q, W	Mortgage or Personal Loan Agreement
E, I, N, O, T, X	Notice of Personnel Change
Q, T	Office Equipment Manual (e.g., fax, copier, computer)
E, Z	Professional Journal for the Food Service Industry
E, N, W	Profit & Loss Report
E, H, M	Recipe
A, G, H, L, O, U, Y	Safety Regulation
N, V	Supplier Contract
W	Tax Guide
E, G, I, J, K, L, N, P, Q, V, W, Y	Travel and Business Expense Policy

Were you or your learners able to identify any jobs that require **no reading**? We found none. Even if a few jobs could be found, the exercise still demonstrates that the **vast majority** of learners must acquire Reading for Information skills to succeed on the job.

Note: By completing this exercise and comparing their work to the key, learners will **expand their understanding of the wide range of documents found in the workplace and the jobs that use them**. The exercise is *not* designed to be a pencil-and-paper test for which the goal is to get as many correct answers as possible. In fact, several correct answers are possible; those provided in this key are intended to be a guideline only.

How Do I "Level" My Activities?

The Reading for Information skill set contains five levels of proficiency—Levels 3 through 7. This section:

- Describes the indicators that help you distinguish between levels.
- Provides an overview of the indicators for each level.
- Offers hands-on practice in leveling activities.

It was designed to help you develop learning activities that target a certain skill level and to assess the skill levels addressed by prepared learning activities.

Distinguishing Between Levels

The easiest way to distinguish between levels is to consider the general elements, or *level indicators*, found in the Reading for Information skill scale. The name and definition of each indicator follows:

- ***Length.*** How long is the document or passage used in the learning activity?
- ***Complexity.*** Complexity covers several factors. How much detail is found in the document? Is all of the necessary information provided or do readers have to read between the lines? Is the information imparted in a logical order or scattered throughout the document? Are sentences short, simple, and introductory or formal, compound, and complicated? Are paragraphs short and simple or dense and complex?
- ***Vocabulary.*** Several factors are considered under the vocabulary indicator too. Is it mostly elementary, intermediate, or difficult? How much jargon is included? How many technical terms and multiple meaning words are included? Are jargon, technical terms, difficult words and/or multiple meaning words defined in the document?
- ***Instructions.*** How many steps are included in the instructions? Are instructions simple, direct, and straightforward or are they complicated? Do readers need to choose from multiple options? Are the options complex?
- ***Application.*** Are readers required to apply the instructions within a defined scenario, a partially defined one, a similar one, or a totally new one?
- ***Typical documents.*** This indicator is more ambiguous than the rest, because the same type of document can be adapted to fit all five proficiency levels. For example, all of the sample scenario exercises in the Learning Activities section use typical business

memoranda. Therefore, **always consider document type in conjunction with several of the other elements**. Sample documents are listed in the overview table (p. 19) to help clarify the differences between levels and provide ideas for customizing activities for your learners.

These leveling indicators are applied specifically to each proficiency level in the Leveling Overview table on p. 19. This table highlights the differences between Reading for Information levels. Use it as you complete the hands-on exercises, and refer to it often in implementing Reading for Information activities. Note: You will find that some overlap between levels exists. Similar to the way skills are learned and applied in the work world, Reading for Information skills move from one level to the next on the basis of several, but not all, indicators.

Leveling O			
Level Indicators	**Level 3**	**Level 4**	
Length	Short	Somewhat longer	
Complexity			
• **Detail**	Limited to needed information	More detailed than Level 3	Signi broa
• **Clear/orderly**	All information clear; no reading between lines	Some details implied; no reading between lines	No re more less
• **Sentences**	Simple, short	Some complex sentences	Mixe comp
• **Paragraphs**	Short	→	Long
Vocabulary	Elementary; most words defined in text	Elementary, but more difficult; some undefined	Jargo techn
Instructions	Few steps; simple tasks	More steps; complicated instructions; may contain conditionals	Many at lea
Application	N/A	Consider changing circumstances in making decisions	Apply simil situa
Typical documents	Announcement; short memorandum; simple schedule or instructions	Job procedure with several steps	Healt offic

verview

Level 5	Level 6	Level 7
→	→	Long
ficantly more detailed; der topics	More details; denser	More complex concepts
eading between lines; complex; somewhat orderly	Some reading between lines; less logical order	More reading between lines
d (some simple, some plex)	Complex, formal	Significantly longer, denser
er, more complex	→	Significantly longer, denser
n/multiple meaning/ nical words; defined	Advanced; jargon & technical terms; some undefined	Hard; legalese; unusual words
steps &/or details; st 1 conditional	Multiple steps & conditionals; complicated instructions	→
information in text to ar, but undescribed tion	Apply complicated guidelines to given & undescribed tasks; generalize to similar	Generalize to unrelated situations
h claims procedure; equipment manual	Simple contract; some city codes	Complex legal document; corporate tax guide

Hands-on Leveling

Maintaining *Reading for Information's* focus on workplace reality, the Leveling Practice activities use samples of two of the most common workplace documents—memoranda and contracts. By completing the Leveling Practice, you will gain **practical experience** in leveling activities.

As you practice leveling, remember this **fundamental guideline**—to accurately identify a level on the skill scale, you must consider *both* the reading material *and* the task being performed. In other words, you must ask two **guiding questions**:

1. Do the learning materials address one or more of the skills contained in this level?

2. Does the task to be performed require the reader to apply one or more of the skills addressed in this level?

These two guidelines have been integrated into the checklist on the following page for you. The checklist will help you adapt your current learning activities to the Work Keys levels and assess the levels of learning activities found in other resources. You may wish to use it when creating your own activities to help you target the desired proficiency level.

Proficiency Level Checklist

Instructions: Review the passage you wish to assess, then complete the checklist by circling (or writing an *X* at) the appropriate place on each line. Refer back to the passage as often as you like. Scan your marks to see which level the majority of them fall within. (Level numbers are found in parentheses at the top of the form.)

	(3)	(4)	(5)	(6)	(7)
How long is the passage?	Short	Somewhat longer	Longer	Longer	Very long
What level of detail does it contain?	Needed information only	More detailed	Much more detail; broader topics	More detail; denser	More complex concepts
How much reading between the lines is required?	None	None, but some implied information	None, but less orderly & more complex	Some, and less logical order	More reading between lines
What are the sentences in the passage like?	Simple, short	Some are complex	Mixed (some complex, some simple)	Complex, formal	Much longer, denser
What are the paragraphs in the passage like?	Short	Still short	Longer, more complex	Still longer, more complex	Much longer, denser
What is most of the vocabulary in the passage like?	Elementary, defined	Elementary, but harder, some undefined	Jargon/technical/ multiple meanings, but defined	Advanced; technical/jargon; some undefined	Hard; legalese; unusual words
Are instructions direct or complex?	Simple, few steps	Complicated, more steps, may contain conditionals	Many steps and/or details; at least 1 conditional	Complicated; multiple steps & conditionals	Complicated; multiple steps & conditionals
Does passage require application of instructions or information?	No	No	Per given guidelines only	To given & undescribed situations	To unrelated situations

Adapted from *Work Keys HAC Skill Analysis Training Program Manual*, ACT, 1999, p. 7.

Leveling Practice

Instructions:

1. Review each sample activity and determine which Reading for Information proficiency level it most closely represents. Write the level number (i.e., 3-7) in the designated box.

2. After you finish assessing both activities, briefly describe what changes you would make to adapt each one to the next higher level. (You are encouraged to use the indicator descriptions and the Leveling Overview table to complete this activity. The Reading for Information Skill Set Table on p. 9 may be helpful too.)

3. Now practice leveling existing activities. Choose some you have created and some you found in a resource book. Follow the procedure you used in Step 1 of these instructions to identify the level of each activity. You may wish to follow the procedure in Step 2 to adapt the activities to different levels, based on your learners' needs and your curriculum plans.

4. You may wish to gain further leveling skills by creating your own learning activity, customized to the Reading for Information level you want to target with your learners.

Memorandum

To: All Employees

From: John J. Grant
Safety Director

Re: Watch Out for Children!

Date: May 15, 2000

Another school year is almost over. Start watching for children on your routes. We had a near tragedy last year. I am pleased to report that young Joey has completed his physical therapy. His doctors expect a full recovery. I'm sure this news brings relief to all of us.

We must reap the maximum learning potential from last year's accident. Therefore, all drivers and substitute drivers will attend a **mandatory** refresher traffic safety course. Local law enforcement officers will provide the training at 7 a.m. Monday in the employee meeting room. The course takes one hour. You will be paid an hour of overtime.

Coffee and donuts will be provided. Absence is not an option!

1. Where do all drivers need to be at 7 a.m. on Monday?

2. What do drivers need to start doing as soon as they receive the memorandum?

What Level? ☐

Leveling Practice Activity #2

10. Supplier hereby agrees to all of the duties and responsibilities described in paragraphs 7a through 7e herein to industry standards for those activities, and to the full satisfaction of Client. If at any time Client becomes dissatisfied with one or more of the services provided by Supplier, Client will communicate the specific problems to Supplier in writing, including measurable performance criteria for making improvements that will satisfy Client.

    a. If at any time Supplier is unable to comply with Client's requests for improvement, and parties are unable to negotiate a resolution that is satisfactory to both parties, then either party may terminate this agreement. In the event of such termination, the terminating party must give notice to the other party at last seven (7) days in advance.

    b. If Supplier terminates the agreement prior to full completion of the duties and responsibilities described in paragraphs 7a through 7e, Supplier forfeits the security bond posted for this agreement, in its entirety. If Client terminates this agreement, Client must return Supplier's security bond no later than thirty (30) days after notice of termination is given.

Problem:

You are the Client. You are satisfied with the quality of your Supplier's work, but he is twenty days behind schedule and the project deadline must be met. What should you do?

What Level? ☐

Leveling Practice
Answers

Activity #1

The memorandum is a **Level 3** document. Indicators include short, direct sentences and few, simple instructions. In addition, employees do not need to read between the lines because the Safety Director's message is quite clear.

There are several ways to **move this activity to Level 4**. Two are provided.

1. Add a question that requires learners to deal with a cause-effect relationship. For example, "You will be on your honeymoon in Hawaii on Monday. Since absence is not acceptable, what should you do?" [Answer: Explain the situation to the safety director and offer at least two alternatives for getting the training before or after your honeymoon.]

2. Add more instructions to the memorandum and/or make them more complicated. For example, instruct employees to choose from three possible training times and follow a sign-up procedure.

Activity #2

The passage contains a few paragraphs from a standard supplier contract. Did you recognize the legalese clues? If yes, then you correctly identified it as a **Level 7** document. Congratulations! The activity problem validates this conclusion by answering the second guiding question on p. 20, i.e., "Does the task to be performed require that the reader apply one or more of the skills addressed in this level?" It requires readers to eliminate unnecessary information and apply complicated facts to a hypothetical situation.

As you probably concluded, you cannot adapt this activity to a higher level. If you missed the Level 7 clues, don't worry about it. The goal of the Leveling Practice activities is hands-on learning, not getting it right the first time!

How Can I Help Learners Improve Their Reading for Information Skills?

Helping learners improve their Reading for Information skills—that is the basic challenge, isn't it? ACT found that general strategies used to teach reading apply to preparing learners for the workplace. The Work Keys system expands upon traditional strategies by providing **work-related content** (described in the section titled, "About Workplace Documents") and **cognitive strategies**. Cognitive strategies help learners overcome the tendency to mentally shut down when confronted with difficult or poorly written documents. This section outlines several cognitive teaching strategies* that have proven successful in helping learners improve their Reading for Information skills.

Hint: Most strategies described in this section can be effectively applied to all five Reading for Information proficiency levels.

Educators and trainers contributed the bulk of the teaching tools described in this section—what works for them, including examples. Others were adapted from those presented in ACT's *Targets for Instruction: Reading for Information* and in general instructional strategy books. The result is a **comprehensive compilation** of teaching tools that work well for reading instruction. In addition, all of the tools described in this section address the cognitive processes needed to develop reading competence; therefore, once mastered, the **skills can be implemented in a variety of occupational fields**.

This section begins with an **overview matrix**. It lists tools along the left side and skill categories across the top. Locate your favorite strategies and the matrix will show you with which skills those tools are most successful. Use the matrix now to gather strategy information quickly and later for quick reference as you plan and implement Reading for Information learning activities.

Descriptions and examples of the strategies follow the matrix. The strategy descriptions are organized by skill category (i.e., choosing main ideas or details, understanding word meanings, applying instructions, applying information and reasoning), so you can find the skill you want to focus on and review the most successful tools for that skill area. In addition, a **reading prerequisites** subsection precedes the four skill-focused subsections. It contains strategies for preparing learners to work on Reading for Information skills. All contributors agreed that spending this kind of preparation time pays huge dividends later when learners complete Reading for Information activities. Scan these descriptions for new ideas and/or study them for comprehensive preparation for teaching Reading for Information skills.

**For purposes of this book, the terms teaching strategies, teaching tools, strategies, and tools are used interchangeably.*

My Notes About Teaching Strategies

Teaching Tools Overview Matrix

Strategy	Description	Works well with... Skill Cat. #1 Theme Facts	Skill Cat. #2 Word Meaning	Skill Cat. #3 Instructions	Skill Cat. #4 Reason & Apply
5Ws	Analyze with who? what? when? where? why?	✔			✔
Case Studies	Real-life scenarios			✔	✔
Cause-effect/ Problem-solution Flags	Flags include *because, since, if, therefore*			✔	✔
Chunk Reading	Focus on sentence groups or paragraphs versus words	✔			✔
Cognitive Operations	Join, exclude, select, infer	✔	✔		✔
Combining from Multiple Sources	Require learners to get information from several sources			✔	
Concept Circle	Use related words to define an unknown word		✔		
Context Clues •Surrounding words •Prior knowledge •Examples •Contrast •Comparison •Pictures •Visualizing •Cloze sentences	Tools to define unknown words using context (See pp. 36–37 for definitions of each context clue.)		✔		
Converting Instructions	Example: Write sentences from chart or vice versa			✔	
Critical Thinking	Facts + Inference + Application			✔	✔
Dictionary	Make it a habit		✔		
Highlighting	Mark key points	✔		✔	
Listing Steps	Pull steps from a narrative			✔	
Modeling	Demonstrate skills taught and verbalize thinking processes	✔	✔	✔	✔
Morphemic Analysis	Define word by root, prefix, suffix		✔		
Phonics, Semantics and Syntax	Define words by sound, context, and sentence order, respectively		✔		
Policy Writing	Create a policy (reasons behind)				✔

Strategy	Description	Works well with...			
		Skill Cat. #1 Theme Facts	Skill Cat. #2 Word Meaning	Skill Cat. #3 Instructions	Skill Cat. #4 Reason & Apply
Puzzle Approach	Cut and paste sentences sequentially			✔	
Questioning	Seek information; investigate; think	✔			✔
Rehearsed Reading	Read familiar text aloud	✔	✔	✔	✔
Retelling	Oral or written summary of text read	✔			
Rewriting	Edit; correct; improve clarity	✔			
Sorting Conditionals	Under headings: *If xyz occurs* and *Then do abc*			✔	
Venn Diagram	Comparing similarities and differences			✔	✔
Visual Flags	Bold, italics, ( ), *called*, *known as*	✔	✔		
Visual Organizers • K-W-L Chart • Cohesive Ties • Mind/semantic-mapping • Jot Chart • Flowchart • Comparison Chart • Outline	Sort and order information; identifies meaning; guides application (See pp. 31, 34, and 39 for definitions of each.)	✔		✔	✔
Visualizing	Picture in mind what reading about	✔			
Word Sorts	Categorize word lists		✔		
Write Instructions	Create instructions for a task			✔	

Activities for Developing Prerequisite Reading Skills

Some contributors use activities that help learners develop and practice **prerequisite skills** at the beginning of a new school year or when beginning a reading-related course. Such activities help learners settle into a learning mode and let instructors assess learners' current reading skills. Corporate trainers use them for both assessment and helping adult learners get comfortable with the learning environment. Parents like them because they help them change hats from parent to teacher. Mentors suggest using prerequisite tools to break the ice. Of course, almost every prerequisite activity can be used as an introductory or engagement activity for a learning activity.

Motivate learners to develop or enhance their reading skills. Most instructors understand only too well that building a hunger for learning the subject matter dramatically increases learning results. Surprisingly, telling learners that they need Reading for Information skills to succeed in the workplace may not be enough to motivate them to work on improving those skills. However, it is an excellent foundation to build upon because everyone likes to know, **"Why do I have to learn this?"** Here are several ways to build upon the why foundation:

- Distribute a document and ask learners why they want to read it. And don't let them get away with answers like, "because you're making us," "because I want to pass this class," or "because I want to get a good job." Encourage them to **personalize their reading** by having them predict what they could do with the information contained in the document. *Hint: To maximize learning, employ this strategy after learners complete an activity that helps them* ***focus their thoughts*** *(see p. 31).*

- Have learners **write historical records**, like family histories and anthologies. Let learners exchange their historical documents and answer questions like: How would a librarian use this? An historian? Future generations? Then help learners assimilate their experience with writing historical records to the workplace by asking them to brainstorm job situations that require writing similar histories. (Example: Equipment technicians maintain a machine history for troubleshooting and product quality.) Have learners keep their historical documents for use in completing other reading activities (e.g., choose some strategies from the overview matrix).

- Ask **local celebrities** (e.g., television or radio personalities, mayor, professional athletes, high-profile business persons) to make a guest appearance and explain how reading helped him or her succeed. Ask if your local literacy initiative has a similar video product, or ask your school district to collaborate with such an organization or the local chamber to produce one.

- **Capitalize on popular culture** in reading activities. For example, use popular movie and music reviews for reading assignments or assign projects that require learners to research their favorite electronic or popular things (e.g., computer program, Internet, television program, video game, actor, singer). Have learners read a popular literary classic when it finds its way into popular culture, like when *Titanic* hit the big screen. Remember, too, that Internet searches require Reading for Information skills—especially

when searches are structured around focused learning activities designed to develop such skills.

Model the skills and methods you want learners to develop. For example, verbalize your thought processes as you demonstrate ways to identify the meaning of a technical term. Throughout your demonstrations, talk through each *thinking* step, implement it, then facilitate as learners try each step. Finally, have learners practice and apply the steps on their own. Give them at least three independent practice exercises and lots of positive feedback.

Hint: Modeling is a highly effective strategy for teaching all of the Reading for Information skills.

Help learners focus their thoughts. A **K-W-L Chart** (see illustration) is a focusing tool. Give learners a topic and have them complete the first two columns of a K-W-L chart. Then provide a document and instruct them to read it and complete the third column in the chart. Provide a compare-and-discuss task to complete the activity. **Skimming** is another focusing tool. Have students skim headings and highlights in a passage, then discuss what they found. They could turn the headings into questions and work in teams to swap and answer the questions. **Journal assignments** and class team **discussions** help learners focus their thoughts too. For example, have learners reflect upon a given topic, then discuss or write about what they already know about it or a similar topic.

K-W-L Chart for the Topic Part-time Jobs

K = What I Know	W = What I Want to Know	L = What I Learned or Still Need to Learn
• No benefits • Boring/dirty work	• Best companies to work for • Are there any interesting jobs?	• Many part-time jobs exist • I would enjoy some of them • Qualifications? • Best companies?

Adapted from *The Volunteer Tutor's Toolbox*

Teach learners to read with a questioning mind. Reading with a **questioning mind** engages learners in their reading and helps them apply the information more thoroughly. The instructional strategies listed, used in *any* subject area, will help learners develop questioning minds.

- Reflective exercises
- Essay questions
- Open-ended questions
- Activities that require learners to "teach" others
- Math thought problems
- Science experiments

Have learners pause to reflect on what they are reading. **Note-taking** and or **highlighting** helps learners develop the habit of reflecting. Give learners some fun, multiple-paragraph reading materials and have them pause after reading each paragraph and answer the question, "How can I use this information in my life today?" Contributors recommend teaching readers to (1) recognize when their minds wander or shutdown and (2) let this sensation trigger them to pause, scan the text they just finished, and jot some notes or highlight key points. Most important, make appropriate opportunities to read items (e.g., announcements, instructions, news stories) aloud so that you can model all of the habits described in this paragraph.

Ask learners to read narratives about their favorite topics. Narratives include books, articles, letters, memoranda—any written explanation of an event, experience, or the like. They provide a powerful tool for **motivating learners to read** and for **developing reading skills**. Concerning motivation—nothing captivates a reader more than a well-written narrative about his or her favorite topic (e.g., coaches love the sports page, teenage girls enjoy fashion magazines). And since narratives are found in nearly every workplace document, practice in reading them is essential. (Examples of narratives in workplace documents include a letter that contains an account of the last meeting and a job procedure that contains an explanation of steps for completing a job.) In addition, well-written narratives naturally address *all four* Reading for Information skill categories because they contain a main idea and key points, require attention to word meanings, follow a series or sequence, and drive readers to determine why something is happening. To use narratives:

- Establish guidelines such as length and unacceptable topics/language for learner-selected narratives and enforce them (i.e., non-compliance results in a failing grade).
- Have learners use their narratives to complete a variety of assignments. Several examples can be found in the Activities section of this book.
- Progress to working with narratives in workplace documents *after* learners become comfortable practicing Reading for Information skills with their favorite narratives.

Narratives naturally address all four *Reading for Information skill areas.*

Provide regular opportunities to follow instructions. Again, instruct learners to pick a task (e.g., board games, card games, software installation, changing tire, favorite recipes, finding a site on the Internet). Instruct teams of learners to write instructions for their chosen tasks. Then have them exchange with other teams to test their instructions. Originating teams should modify their instructions after the trials, if needed.

Plan daily activities that let learners practice silent reading and writing. Silent reading of self-selected materials on a daily basis is **one of the most effective ways to build proficiency** in reading skills. Learners do not need to understand all the words or comprehend the entire document; the practice is still effective.

Provide lots of practice time. Reading for Information skills are application-driven. Therefore, **the more learners practice applying these skills, the better equipped they are to use them on the job and in their daily lives**. Practicing prerequisite reading activities like those described throughout this subsection helps learners develop a solid foundation for building more advanced reading skills. And practicing Reading for Information activities in general helps learners develop strong critical thinking skills.

Have learners highlight as they read. Because most Reading for Information materials come in photocopies (e.g., memorandums, articles, policy manual pages) rather than in a textbook, you are free to teach learners to **highlight items like topic sentences, themes, definitions, and key points**. Be sure to remind learners to highlight words in headings and titles, too, because readers tend to skip over these and they often contain themes, key points, and word meaning clues.

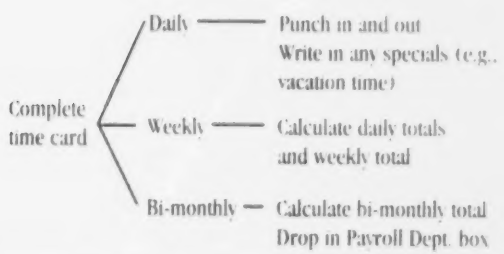
Teach learners to use visual organizers. Visual organizers are devices that **help readers identify, sort, and organize narrative information**. Examples include marking cohesive ties, mapping, and creating jot charts. Samples of these three types of visual organizers are illustrated for you. (Flowcharts and fishbone diagrams are most useful with longer, more complex passages.) Using visual organizers offers another important advantage—learners can reuse their *completed* visual organizers when they complete activities that target the application of instructions, reasoning, and information (i.e., skill categories #3 and #4).

Example of Cohesive Ties

Employees must take responsibility for recording their work hours. You must punch in and out daily on one of (1) (1) (2)
our mechanical time clocks. Special hours such as vacation must be recorded manually. Daily hours must be (1) (2) (3)
(2) (3)
calculated weekly, and a weekly total recorded. Bi-monthly, you must calculate total hours for the pay period (3) (3)
by adding the weekly totals, then deposit your time card in the Payroll Dept. box.

Cohesive ties: Words that help learners connect facts within and between sentences.

Example of Mind or Semantic Map



Mapping: Illustrating categories and relationships within a topic.

Example of Jot Chart

Daily	Weekly	Bi-monthly
Punch in and out	Calculate daily totals	Calculate pay period total
Write in specials (e.g., vacation)	Calculate weekly total	Put card in Payroll Dept. box

Jot Chart: Especially useful for comparing and contrasting facts in complex passages.

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Help learners visualize to find implied details. Provide tasks that require learners to **picture in their minds** the information they are reading. For example, when reading "then deposit your time card in the Payroll Dept. box," learners should picture the box sitting in its location, even though the location is not mentioned. You may wish to have them draw what they are picturing. The cohesive ties strategy works well in finding implied details too.

Have learners rewrite passages to improve them. Examples include turning a memorandum into a business letter or a flyer into a memorandum, summarizing the contents of a contract in a cover letter, and constructing a time line from a proposal. You could provide a very poorly written document and have learners rewrite it for clarity. As learners conduct these rewrites, they will work on other Reading for Information skills. For example, they will have to use a dictionary to define any words they do not understand because the poor writing will limit context clues and they must understand the meanings to complete the rewrite.

Help learners recognize the value of retelling. Learners can summarize what they read orally within team activities or in writing (e.g., taking notes about the key points, completing a journal entry). Team presentations allow retelling too. Use any methods you can find to let learners practice retelling what they read because research shows that **learners' understanding of the content increases each time they retell** something they have read.

Provide practice in cognitive operations. Locating the theme and key points is especially important in complex (Level 6 and 7) documents. Help learners use the four cognitive operations—**join, exclude, select, infer**—to develop higher-level reading skills.

Join—Categorize like information (similar to cohesive ties).

Exclude—Cross out or ignore nonessential information.

Select—Select information needed for a current situation from categorized information.

Infer—Apply the information selected to resolve the situation or solve the problem.

Point out visual flags. Consistently model the use of visual flags like **bold**, **italics**, **appositives**, **parentheses**, and **lead-in words** like *called* or *known as* when discussing reading assignments. Ask learners to demonstrate how visual flags helped them define unfamiliar terms.

Integrate three traditional language theories. Helping learners gain skill in defining words requires purposeful attention to **phonics** (defining words by their sounds), **semantics** (defining words by context), and **syntax** (defining words by their order in a sentence). Important! Research indicates that using a single theory alone is not effective, however, so **use all three theories**.

Help learners become experts in defining through context. In the real world, workers use context to define almost every unfamiliar term. Thus, **you cannot provide too much practice** in this strategy. Pace Learning Systems[1] provides five methods for defining by context.

- *General context*—Direct learners to the **surrounding text** (i.e., words, sentences, phrases) to define an unfamiliar term.
- *Prior knowledge*—Have learners refer to meanings for the word that they **already know** to define its meaning in an unfamiliar context.
- *Examples*—Teach learners to look for words like *for instance* and *such as* because they signal an **explanation** of the word **by example**.
- *Contrast clues*—Have learners look for words like *instead of* and *rather than* because they introduce a contrast clue, a **word or phrase that is opposite** to the unknown term.
- *Comparison clues*—Teach learners to look for words like *similar, likewise,* and *both* because they signal a comparison clue, a **word or phrase that is similar** to the unknown term.

Other ways to define words through context include:

- *Picture clues*—Texts like technical, operating, and product manuals often contain **pictures that provide clues** to the meanings of unfamiliar terms.
- *Visualization*—Instruct learners to **picture in their minds** the scene described in a passage (e.g., to visualize *ornate*, picture a lady in a fancy dress). When introducing this tool, you may wish to have learners draw what they are picturing.

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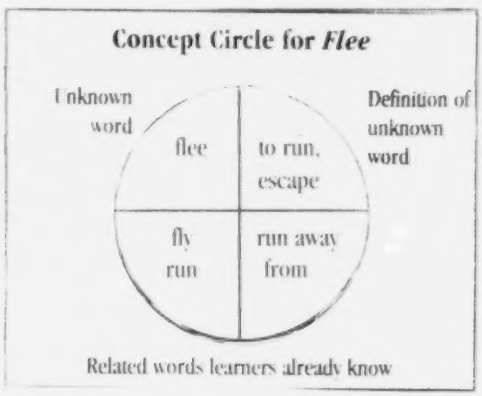
[1] *Reading at Your Own Pace: A self-instructional learning program, Words in Context–Unit 1* by Verbie L. Prevost, Ph.D. (Pace Learning Systems, Inc., 1991)

- *Cloze sentences*—This tool requires learners to **supply a missing word** (e.g., Joe _____ *the ball.) It is most effective when employed* before giving learners a passage, allowing them to first brainstorm several alternatives, then choose the *best* word after reading the passage.

Don't hesitate to **provide direct instruction** in defining words through context. For example, give learners a sample workplace document (find or create one in the level you wish to target) with uncommon words already circled. Ask them to use context clues to define the circled words, name each context strategy they employed, and explain how each was used. Alternatively, give learners the same assignment, except select a description with an illustration from a technical manual for the sample workplace document.

Provide plenty of practice with real-life reading materials. Jargon, technical terms, acronyms, and the use of words with multiple meanings are very common in the workplace, as well as daily life. Help learners become proficient in working with such terms by providing lots of practice with reading materials that contain them, like city codes, newspapers, school regulations, tax guides, and trade journals (i.e., magazines for specific professionals such as doctors, lawyers, manufacturing managers, engineers, and computer programmers). Sports and hobby publications are an excellent source for such terms too. Use long, complex legal documents and regulatory materials for developing Level ¯ skills. Board game instructions are a good source for working with jargon at lower levels. Sample activity: Have learners work in teams to read a passage and decipher meanings of selected words, then write each difficult term in a new sentence and let other teams find the word's meaning from the context. *Hint: Many of the tools already described in this subsection can be applied to jargon, technical terms, acronyms, and multiple-meaning words.*

Guide learners in using concept circles and words sorts. These tools are especially effective when used to define words with multiple meanings. A **concept circle** for the word *flee* is illustrated for you.



Word sorts require learners to sort a list of terms (10–20) into three or four categories. Be sure that several words on the list fit multiple categories. Help students use deductive reasoning as they discuss the multiple uses of the terms. In a closed word sort, the categories are given; in an open one, the learners define the categories. To address higher proficiency levels for word meaning skills, adapt the word sort strategy—have learners write a paragraph about each category, using the listed terms correctly. Then ask them to compare and discuss their paragraphs.

Model morphemic analysis frequently. When you **break a compound word into its smallest parts**—prefix, suffix, root stem—you are using morphemic analysis. While this technique is especially helpful with Level 6 and 7 documents because they contain more difficult words, modeling its use with easier words will help learners gain confidence in using the technique. You can let learners practice morphemic analysis by reviewing common prefixes and suffixes with them and helping them discover their differing meanings based on use (e.g., *in* means *not* in *inaccurate*; it means *inside* in the word *within*). Let them realize that some prefixes have consistent meanings (e.g., *tele-*, *auto-*). **Important!** Don't have learners memorize lists. Simply let them *review* a list for knowledge gain, then have them immediately *apply* the knowledge to actual documents.

Encourage learners to use a dictionary. Keep one handy and set a goal that learners will wear it out every year or so. Provide a lesson in dictionary skills, if needed. Then provide at least one dictionary task in most learning activities so that learners will get into the habit of using a dictionary.

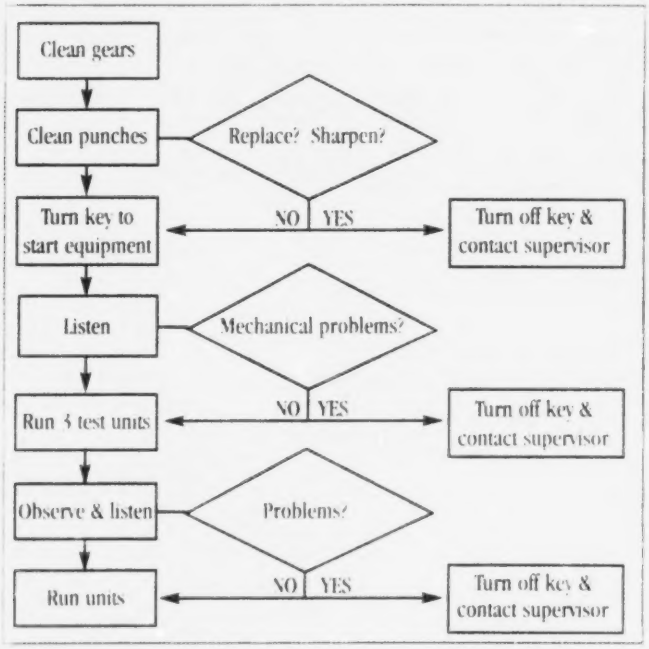
Use cognitive operations to define words. The cognitive operations (join, exclude, select, infer) can be applied to understanding word meanings too. This tool was explained in Skill Category #1 (p. 35).

Skill Category #3: Applying Instructions

Have learners practice using visual organizers to organize instructions. The visual organizers outlined in Skill Category #1 (p. 34) can be applied to *sorting* and *ordering* instructions. **Flowcharts**, **comparison charts**, and **outlines** are especially helpful in ordering lengthy, complex instructions because they facilitate sorting by major instructions, with supplemental instructions and conditionals organized under or beside each major instruction. Examples are provided in the illustrations that follow. *Hint: Tax guides are especially useful when practicing charting or outlining of procedures and instructions.*

Example: Equipment Start-up Procedures

Clean the gears and punches. Replace or sharpen any dull punches. Start the equipment. Use the key on the right side at the top. Listen to ensure no mechanical problems exist. Run three test units through the machine. Observe and listen. Turn key off and report problems to supervisor.

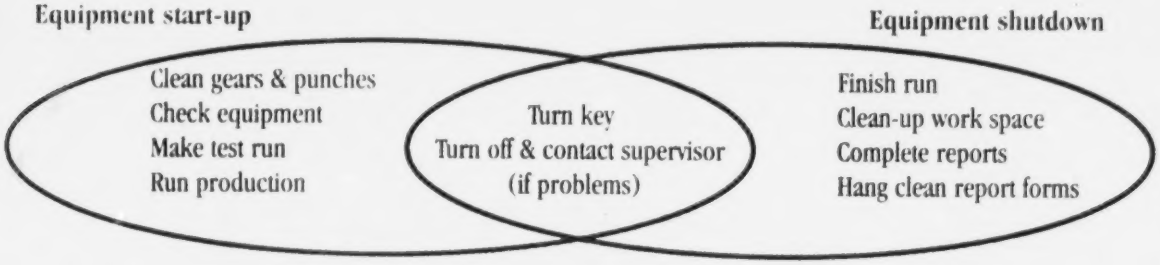


Equipment Start-up Flowchart

1. Clean equipment
   - ✓ Gears
   - ✓ Punches
     - – Replace or sharpen punches? Turn off and contact supervisor
2. Start equipment
   - ✓ Turn key at top right
3. Check equipment
   - ✓ Listen
     - – Hear mechanical problems? Turn off and contact supervisor
4. Run 3 test units
   - ✓ Observe and listen
   - ✓ Problems? Turn off and contact supervisor
5. Production
   - ✓ Run units

Equipment Start-up Outline

Teach learners to use Venn Diagrams to apply instructions to similar and different situations. (See the sample illustrated.) The Venn Diagram technique can be expanded for addressing reasoning and information application skills (Skill Category #4) too.



Teach learners to list steps when reading. They should read or scan the entire document first, then go back to the beginning and list the steps as they find them. Teach them to look for words that are ordering flags such as *first, next, before,* and *after.* To order the steps, learners can number their lists accordingly or transfer them to a visual organizer (e.g., outline, chart).

Help learners sort conditionals. Conditionals describe *if...then* and similar situations. Teach learners to apply the same process used to list steps (described in the previous paragraph) to identifying and organizing conditionals. Charts work well for organizing conditionals because readers can recognize choices quickly after they complete two columns (e.g., an *if* column and a *then* column). This strategy is very helpful in activities that involve Level 5, 6, and 7 documents.

Would your learners enjoy the puzzle approach to ordering information? With this strategy, learners are given a passage and instructed to cut out each sentence. Then they **reorder the sentences sequentially**. You may wish to have them retype the passage, with each sentence on a separate line to make the cutting-and-pasting process easier. (Like retelling, retyping increases a learner's ability to grasp the meaning of the passage.)

Have learners practice converting instructions (e.g., from charts to sentences and vice versa). For example, give learners several appliance troubleshooting charts and instruct them to write the instructions in one or two paragraphs. Have learners "test" their conversions by swapping the paragraphs (not the charts), converting them back to chart form, and following them to complete a task. *Hint: Equipment operating instructions and emergency procedures provide good text for practicing conversions.*

Have learners write instructions to develop skills at Levels 6 and 7. For example, ask them to write step-by-step instructions for how to beat a video game. They must eliminate the false steps (e.g., those that lead players to dead ends), and clearly explain and accurately sequence the steps *necessary for winning*. Have other learners test the instructions and let the originators edit them, if needed.

Create/use activities that require learners to combine information from multiple sources to complete a task. For example, ask learners to plan a menu for a new coffee house that caters to a limited customer base (e.g., college students, office workers). Learners might gather information from potential clients and printed market data, research coffee types and prices, and read science textbooks or journals to learn how to avoid contamination in dairy products. Combining information from various sources helps move activities to Level 7.

Help learners develop critical thinking skills. To think critically, a learner must work with a passage from three viewpoints:

1. Factual—comprehend the facts (literal meaning)
2. Interpretation—interpret and infer additional meaning
3. Application—apply the knowledge gained in #1 and #2 to real-life situations

Hint: Several critical thinking exercises can be found in Reading for Success: A School-to-Work Approach, *p. 90-99 (see Appendix A).*

Thus, facts + inference/interpretation + application = critical thinking. The elements of this formula and its inherent process make critical thinking the *most important tool* learners can develop for addressing Skill Category #4. That's why contributors highly recommend teaching critical thinking independently, then providing daily practice by requiring the use of critical thinking in as many lessons as possible. Help learners establish a solid definition of critical thinking by first explaining the three viewpoints, then demonstrating each viewpoint in a passage. Remember to model your own thinking process as you place each sentence/element in the passage under the facts, inference/interpretation, or application categories. Let learners practice categorizing passages themselves as they exhibit proficiency. Provide learning activities that require critical thinking. Facilitate discussions that allow learners to reflect upon and explain how they used critical thinking to complete all or parts of the activities.

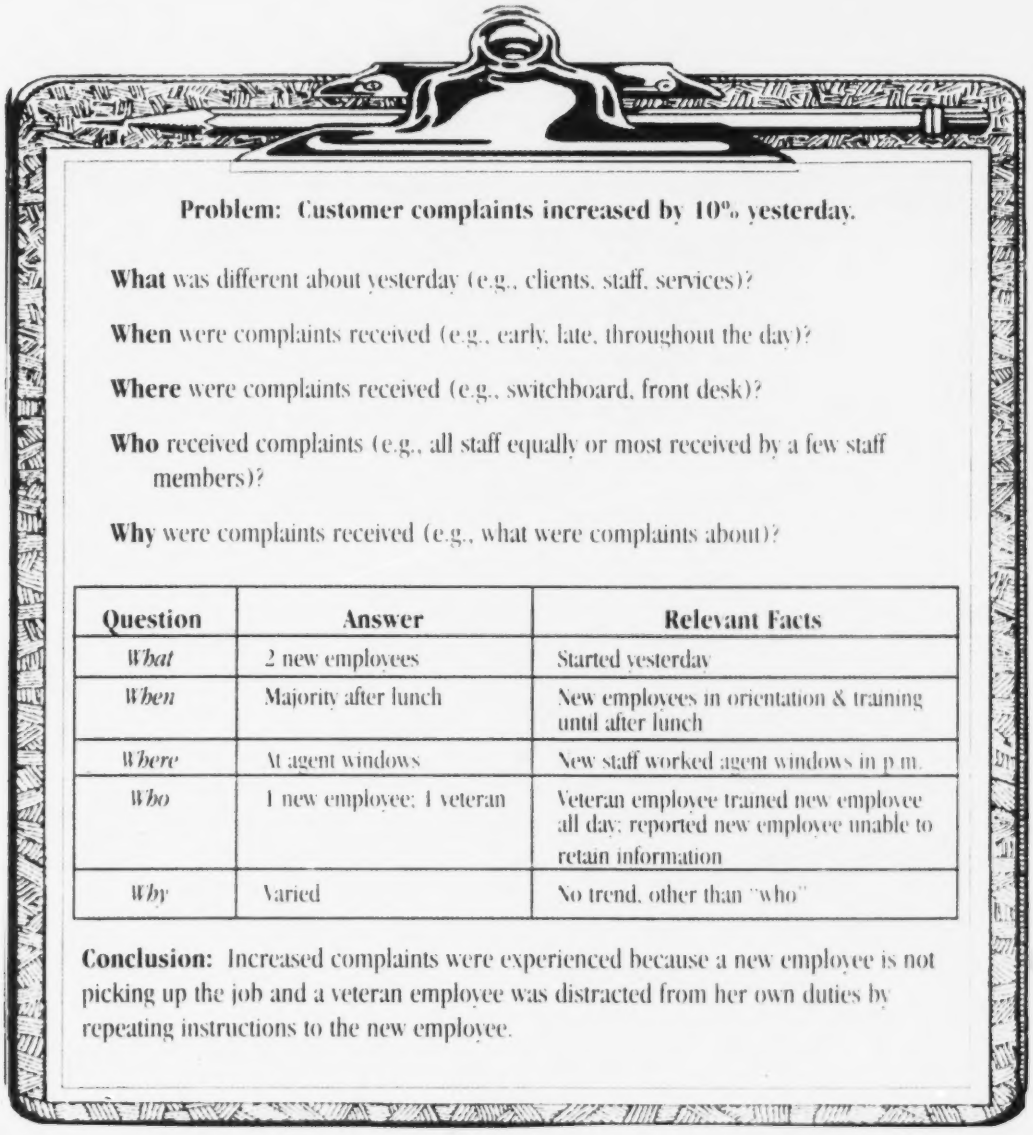
Create questioners. A questioning mind is the **second most important attribute** a learner can possess when facing reasoning and application activities. You can create proficient questioners by providing activities that mirror how learners will use documents in real life. Often workers don't read an entire document or read it in order, rather they *skim* documents and *skip around* because they usually read in search of answers. So give learners documents and ask them to answer questions like:

- Who has the authority to order the needed materials?
- Who is responsible for safety precautions?
- When must the information be submitted?
- Why is the task important?
- What is the project goal?
- Where can you find needed information that is not included in this document?

Be sure to use this technique at all Reading for Information levels so learners can **develop the habit of questioning**. In addition, as documents become more complex (i.e., progressing to higher levels), make the questions more challenging.

Help learners become experts in using the 5Ws strategy. Many well-known businesses (e.g., Honda Motor Company, Worthington Industries) use the 5Ws strategy to **analyze situations and solve problems**. It is an excellent way to consider all major elements of a situation, organize information, and apply it. Here is a sample 5Ws analysis:

Hint: Practicing the 5Ws helps learners develop critical thinking skills and questioning minds.



Problem: Customer complaints increased by 10% yesterday.

What was different about yesterday (e.g., clients, staff, services)?

When were complaints received (e.g., early, late, throughout the day)?

Where were complaints received (e.g., switchboard, front desk)?

Who received complaints (e.g., all staff equally or most received by a few staff members)?

Why were complaints received (e.g., what were complaints about)?

Question	Answer	Relevant Facts
What	2 new employees	Started yesterday
When	Majority after lunch	New employees in orientation & training until after lunch
Where	At agent windows	New staff worked agent windows in p.m.
Who	1 new employee; 1 veteran	Veteran employee trained new employee all day; reported new employee unable to retain information
Why	Varied	No trend, other than "who"

Conclusion: Increased complaints were experienced because a new employee is not picking up the job and a veteran employee was distracted from her own duties by repeating instructions to the new employee.

Have learners practice rehearsed reading. After learners have developed confidence in their reading abilities, let them work in teams to perform rehearsed readings and complete information applications. Passages should be complex and longer (i.e., Levels 6 and 7 passages). Activity example: Have teams read a complex passage (e.g., legal contract, city code), with team members taking turns reading out loud. Have the *readers* focus on trying to

capture and convey the purpose behind the passage (e.g., why this code exists) through things like voice inflection and pauses as they present the passage. Have *listeners* focus on information seeking, listening carefully for the answers to the questions or problems outlined in the activity. In essence, readers are actors, while listeners play the role of detectives. *(Hint: Learners can read instructions aloud to help them identify, order, and apply them too.)*

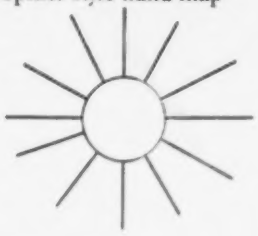
Hint: Maps that learners create to organize the details of a passage (Skill Category #1) should be reused in reasoning and application activities, because learners will use maps in this way on the job

Help learners expand their mapping skills to reasoning and application activities. Mind and semantic maps (see Skill Category #1, p. 34) can be quite helpful in **deciphering the reasons behind a procedure or policy** and in **organizing information** for application purposes. Explain to learners that with practice, they will recognize which map style works best with the each topic situation. For example, a linear map works well for order and timing situations, while a spider-style map works best for reasoning and analysis purposes. Give learners frequent practice with choosing map styles (see illustration) and model such choices whenever possible.

Sample Mind Map Styles

Linear-style mind map

Spider-style mind map



Make learners aware of cause-effect/problem-solution flags. Such flags include the words *because, therefore, since,* and *if.* Ask learners to circle relational flags in a document and explain what cause-effect or problem-solution relationship exists in the document. A semantic map is another helpful tool when working with cause-effect situations.

Let learners practice creating policies. Actually writing a policy helps learners **think about the reasons behind them**. Have learners write policies for familiar situations (e.g., have high school students write a policy prohibiting sharp objects/weapons). Make learners present and defend their policies. You may wish to facilitate debates about some policies.

Use case studies liberally. Working with real-life cases is probably the **one of the easiest and most effective ways to prepare learners for the workplace**. Activities can be built around case studies in many ways. Here are a few that focus on identifying the reasons behind policies and on applying information to a situation or problem:

- Have learners **role play policy decision-making** in teams, focusing on finding the meaning behind the policy. Present a policy and a situation that requires a policy

decision. Give learners plenty of time to explore possibilities and debate them. *Hint: You can find materials and ideas for policy decisions in zoning regulations, school board policies, local or federal safety regulations, company policies, and social service regulations.*

- Provide policies (e.g., termination) from three different organizations. Have learners **compare the policies and determine why the differences exist**. Explain that management and supervisory personnel conduct such research and comparison activities in problem-solving situations, including efforts to improve efficiency and quality, and decrease job-related accidents.

- Give learners **multiple case studies** that contain less obvious relationships to policies. Encourage them to combine and compare information and to use critical thinking skills to solve the case problems. (This alternative provides excellent practice of Level 3 skills.)

Provide lots of practice in "chunk reading." Reading text in chunks **improves** comprehension. This strategy is similar to morphemic analysis (used to break down words to understand their meaning). In "chunk reading" learners break passages and paragraphs into smaller parts to understand the meaning behind section, as well as the total document.

Guide learners in the use of cognitive operations as they practice finding the underlying reason or principle in a policy situation and applying it to a new situation. More information about cognitive strategies can be found under Skill Category #1, p. 35.

Note: Several tools described in "How Can I Help Learners Improve Their Reading for Information Skills?" were adapted from *Work Keys Targets for Instruction: Reading for Information* and *Workplace Literacy Teacher Training: Strategies for Instruction.*

Teaching Tools Summary

As materials become more complex, especially at Levels 6 and 7, it is harder to *isolate* distinct skills or skill categories—to find or create an activity that addresses a *single* skill. This is simply the nature of both the reading function and the real world. And it is not a problem because **learners need to address skills interdependently on the job**. However, practice becomes increasingly important as learners move to Levels 6 and 7 to ensure they *master* the targeted skills. The good news—this practice strengthens learners' proficiency in *every* Reading for Information skill.

Nevertheless, specific learner needs (e.g., lack of proficiency with an isolated skill) and assessment requirements sometimes call for the isolation of skills. Simply **focus on that skill** when choosing or writing exercises for such purposes. Other skills will be addressed almost unconsciously, but they will not be the major focus of the activity. The learning activities in this book follow this procedure, so use them as a model.

Now that you have reviewed—even studied—the tools suggested by contributors, simply **choose the ones that are right for you**. No matter which strategies you choose, some general guidelines from contributors' experience may be helpful:

- Use the learning activities in this book as **a model for applying the tools** described in this teaching tools section (many of the tools were used in this book).

- **Customize strategies and materials** to build upon the ways in which your learners are already using reading skills in real life. For example, consider the types of documents they read and tasks they perform in present jobs or volunteer work, and customize your instructional materials and strategies to align with these experiences. Customizing strengthens learning because it provides context—learners already have a mental "database" for processing and storing the new information.

- **Develop additional learning activities** using supplemental resources. *Targets for Learning* offers sample activities and provides ideas for others. It is *not* a comprehensive textbook. You need to give learners plenty of practice with work-related reading situations at the targeted Work Keys level so they can master the skills at that level. The ideas in the following bulleted list should help you create your own learning activities collection:

  - Modify work-related situations from existing textbooks and resource materials to the Work Keys format.

  - Obtain authentic workplace documents and incorporate them into Work Keys-leveled activities and/or use them to write your own. Ideas for collecting workplace samples can be found in the bulleted list on p. 14.

- Ask learners to bring in examples of workplace documents they or others encounter at work. Then have them work in teams to determine the Work Keys level of each document and solve the tasks.

- Invite professionals from local businesses to present workplace documents and tasks to learners as they would with company's employees. Have learners complete the tasks.

Where Do I Begin?

Throughout this book we encourage instructors to be creative and flexible, adapting strategies and activities to learner needs and instructional settings. However, there are **five guidelines for instruction** that apply to every learner and instructional setting:

1. Use **high-quality assessments** both before and after instruction. The most accurate method is to give the Work Keys Reading for Information assessment. If that is not possible, use the practice test provided on p. 231. Learners can use their pretest scores to identify their individual skill goals. Instructors can use them to identify the appropriate level at which to begin instruction, avoiding wasted time in teaching skills that learners have already grasped. Post tests, checklists, and similar evaluation tools can help instructors evaluate skill mastery as learners complete learning activities and levels. (Important additional information about assessments can be found in Appendix C.)

   Hint: To make the most accurate identification of learners' Reading for Information skill levels, instructors can use learners' performance on other reading-related activities to confirm test scores and/or provide additional assessment

2. Have **learners help establish personalized skill goals** that clearly relate to job qualifications. Personal involvement in goal setting helps learners take responsibility for developing the desired skills and motivates them to apply themselves to the learning activities. Having learners determine their own placements levels (see Appendix C), is one way to interest them in the goal-setting process.

3. Before beginning instruction toward achieving a new level (including Improving to Level 3), confirm that learners can demonstrate the **prerequisite skills** for that level. Provide remediation, as needed.

4. **Deliver instruction sequentially**, checking to be sure that every learner masters the current step before starting the next.

5. Let learners **practice** the skills at each level **until they achieve solid competence**. Do not move to the next level until learners can demonstrate such competence.

Keeping these five guidelines in mind, and the knowledge you have gained from the "Preparation Station" portion of this book, simply **develop a plan** for providing instruction in Reading for Information skills. Some steps to get you started are listed in the sample plan on p. 49. (The steps are not necessarily in sequential order.) Adapt it to meet your needs.

Sample Plan for Integrating Reading for Information into the Curriculum

1. **Learn about the Work Keys Reading for Information skill set and competency levels.** By teaching yourself about the skills and levels, you will discover practical ideas for helping learners gain Reading for Information skills. In addition, your knowledge of the competency levels will allow you to adapt existing materials to the Work Keys format.

2. **Determine each learner's current Reading for Information skill level.** Use a pretest as explained in Instructional Guideline #2 on the previous page.

3. **Teach learners about the Work Keys Reading for Information skill set and proficiency levels.** Then have them apply that knowledge as you involve them in individual goal setting. To motivate learners to actively participate in setting goals and pursuing them, provide activities that help them recognize the skills they need to develop for reading in the workplace (e.g., a hard-hitting presentation by local human resources professionals, a workforce readiness research project, Reading in the Workplace exercise on p. 15.) In addition, help learners keep their goals in mind as they progress through your Reading for Information curriculum. See Appendix C for ways that evaluation tools can serve this purpose.

4. **Create a reading instruction plan.** This plan does not focus on what you will teach, rather it covers *logistics* like:

   - Remedial and/or prerequisite plans.
   - The number of lessons.
   - The amount of preparation time needed (e.g., to adapt and level current lessons, to gather workplace documents).
   - The length of time required to implement the total Reading for Information curriculum (e.g., a school year, a college semester, a 2-day workshop).
   - How and when to implement your reading instruction plan.
   - Resources needed.

5. **Group learners for instruction and decide at what proficiency level(s) you will begin instruction.** Consider the learners' pretest results, your ability to instruct more than one group at a time, and the availability of colleagues, aides, or volunteers. Experienced contributors offered options for these decisions (see the tables on p. 50).

6. **Provide remedial and/or prerequisite instruction, according to your reading instruction plan.** For maximum efficiency, you can collect workplace documents, work on learning activities, and complete other tasks in your plan while your learners complete the remedial and/or prerequisite activities. Use what you learn during prerequisite instruction to customize and enhance the learning activities you are developing. See the subsection "Reading Prerequisites" (pp. 30–33) for a variety of tools and activity ideas that can be used in remedial and/or prerequisite instruction.

7. **Write an instruction schedule and implement it.** Follow the process you already use for this scheduling task and for delivering your planned learning activities.

8. **Assess learners' progress.** Evaluations should be conducted regularly, as described earlier. For further information, see Appendix C.

Grouping Learners for Instruction

The tables below offer a variety of grouping options. Choose the ones most suitable for your learners. And remember to move learners around in teams, especially if you are instructing all learners simultaneously. Changing teams increases learning potential and it more closely represents workplace settings, where employees work on a variety of tasks with different people.

Learner Team Options

Team	Example
Similar-ability teams	Level 4 learners work together
Mixed-ability teams	Level 3, 4, and 5 learners work together
Similarly-motivated teams	Highly motivated learners work together
Mixed-motivated teams	Highly motivated learners work with less-motivated learners

Options for Grouping by Skill Level

Option	Example
Work with one level-based team at a time.	Work with learners who scored at Below Level 3, helping them improve to Level 3. Add learners to the core (Level 3) team as it improves to each level (e..g., add those who scored at Level 3 as the core team becomes ready to improve to Level 4).
Work with two level-based teams at the same time.	Work with learners who scored at Below Level 3 in one team, helping them improve to Level 3 **and** work with others who scored at Level 5 in a second team, helping them improve to Level 6. Move each team up a level and incorporate learners who scored at that level into the groups, as explained in the prior option.
Work with two multi-level teams at the same time.	Combine in one team the learners who scored at Below Level 3 and those who scored at Level 3. Make a similar combination for learners who scored at Level 4 and Level 5.
Work with all learners simultaneously.	Start by providing Level 3 instruction to all learners (after ensuring that all remedial and prerequisite instruction is complete). Have learners work together in varied learner teams as you move them through all five levels. Note: Because many learners will be working below their skill levels, this is the **least effective** way to provide instruction in Reading for Information.

Important: Have learners who are not included yet in a level-based team prepare for upcoming reading instruction by completing practice activities while you work with the level-based teams.

An Important Note to Parents and Other "Unofficial" Teachers

Perhaps you are a home-schooling parent, a reading tutor, an industry trainer—someone who is not a college-trained educator. The preparation materials contained in the previous pages of this book may seem overwhelming. **You don't have to be a certified teacher** to use this book effectively. *Targets for Learning: Reading for Information* was developed for teachers, parents, tutors, industry trainers—anyone who is helping learners to prepare for the reading-skill demands of the workplace. Each lesson provides clear, step-by-step instructions and plenty of supporting information. Charts, checklists, and samples found throughout the preparation materials give you at-a-glance guidance. Contributors recommended these additional suggestions:

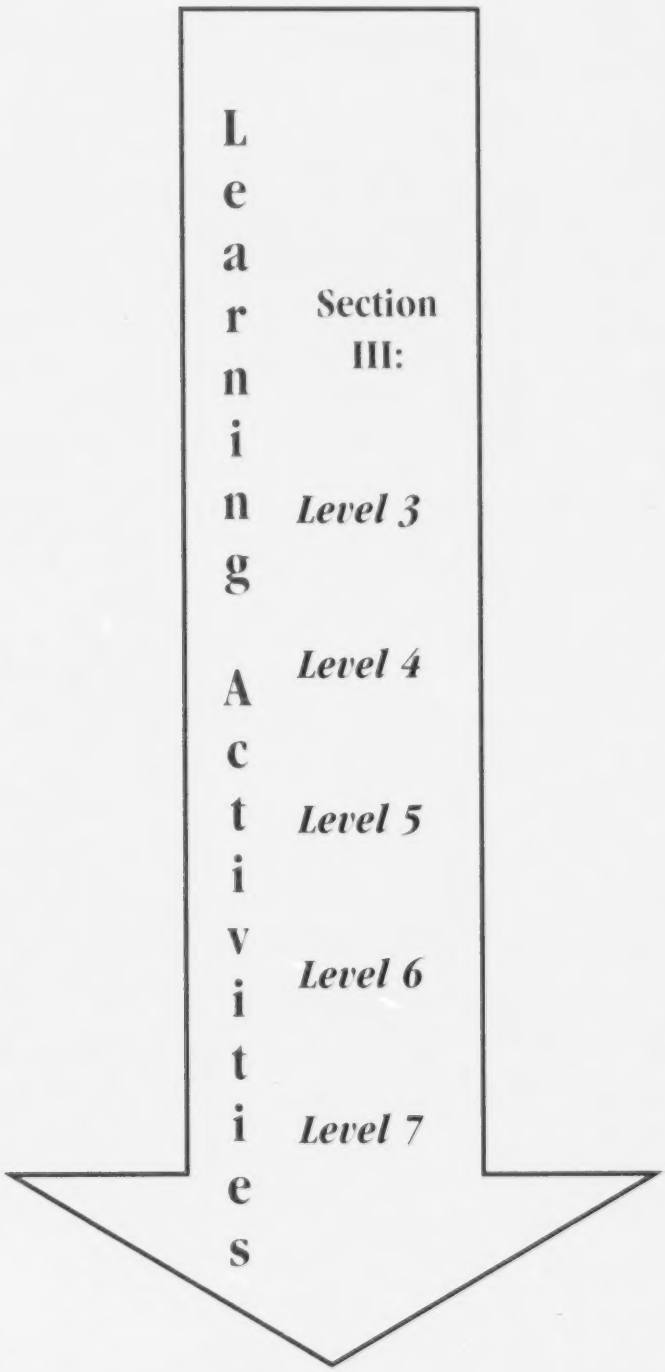
- Keep it simple! If you are *concerned about* whether your learning activities accurately target the desired *proficiency level*, use the learning activities in this book as a model. Find a workplace document you would like to use and "borrow" instructions and learning tasks from an activity contained in the level you wish to target. For example, if you want to target Level 7 skills, find a dense and complex legal document, then customize the tasks contained in Learning Activity 7.2 to your document. In this way, you can be sure that your *learning tasks* target Level 7.

- To *create a learning activity*, follow the five-step process outlined below.

  1. **Find a document** you want to use.
  2. **Level it** according to your needs, using the chart on p. 19 as a guide. Note: You can pick documents that meet the criteria for a certain level, or change documents (e.g., rewrite to make them less complex, use only a few sentences) to accommodate the level you wish to target.
  3. **Identify the skill categories** you wish to target with the document.
  4. Check the matrix on pp. 28–29 to **identify the best teaching strategies** to use for the targeted categories. Choose one or more to use for this activity.
  5. Think about how the document would be used in a real-life setting, then **create questions and exercises** that put learners in that setting. Use the learning activities in this book as a model and to give you ideas. Remember! You can *keep it simple* by customizing the tasks from one of the learning activities in this book.

Some of the contributors to this book once felt a bit overwhelmed about creating and leveling their own Reading for Information activities too. But they decided to try it anyway, and from their own experiences in developing Reading for Information activities, they identified this five-step process. So pick a document and try their process. It really works!

Notes


Learning Activities
Section III:
Level 3
Level 4
Level 5
Level 6
Level 7

Learning Activities Introduction

Please remember that *Targets for Learning: Reading for Information* is intended to **supplement** your curriculum. Use the activities in this section as a starting place for building a customized reading skills instruction plan for your learners. (See the sample plan on p. 49 for detailed guidance.)

The learning activities in this book are **divided by skill level**. For example, exercises contained in Improving to Level 3 are designed for learners who cannot demonstrate the skills listed under Level 3 in the Reading for Information skill set or learners who score Below Level 3 in the relevant Work Keys assessment. By completing the Improving to Level 3 learning activities—and the other activities you provide for them—learners can achieve proficiency in Level 3 Reading for Information skills. After they master Level 3 skills, learners will be equipped to complete the activities found in Improving to Level 4, and so forth through Improving to Level 7.

To support instructors in targeting individual Reading for Information skills, the learning activities are **designed to address a single skill** (the primary skill). However, most activities address other skills as well, because the exercises mirror typical job situations where skills are applied *collectively*. The additional skills are given secondary importance through the activity's design. All of the skills addressed in each learning activity are listed under the title *Skills Addressed* in the instructor's guide; the **primary skill** is highlighted.

Within each learning activities section, you will find:

- A summary of the **skills addressed** at that level.
- **Characteristics** of learning materials that target the level.
- A **theme activity** that targets all four skill categories. The theme activities are based on the case study described on the next page.
- An **instructor guide** that outlines the materials needed, skills addressed, prerequisite skills and activities, instruction methods, resources (as appropriate), and ideas for additional practice.
- A **learner handout** that contains the workplace document and the assignments for each learning activity, written in learner voice.
- A **learning activity for each covered skill**, numbered and titled.
- **Practice problems** that contain multiple-choice questions similar to those found in the Work Keys Reading for Information assessment.
- **Answers** for the practice problems.

*Hint: Instructors may wish to review the Learner Handout **first** so they can become familiar with the workplace document and assignments before working with the instructor's guide.*

Reading for Information Case Study

To help learners make connections between levels, each level begins with a theme activity designed around the following case study:

> **Who:** **Learner**
> **What:** **New job—a server**
> **Where:** **Aboard ships from the Bay to Bay Luxury Cruise Lines fleet**
> **When:** **Start immediately**
> **Why:** **Great tips and awesome working environment!**

The case study (theme) activity is **always the first activity** found in the section—3.1, 4.1, 5.1, 6.1, 7.1. Unlike the other learning activities in this book, the **theme activities target *every* skill** in the relevant level's skill set. Thus, you will find several assignments in each theme activity. In addition to creating a bridge between levels, the theme exercises are designed to:

- *Reinforce* the skills learned in prior levels.
- Give you a variety of *implementation options* (e.g., assign one exercise per day for several days to introduce a level; assign the total theme activity at the end of a level's instruction, using it to evaluate learners' proficiency; integrate theme assignments throughout your customized curriculum to maintain a common connection between skills and or levels).
- Provide a *model* for you to use in customizing documents and activities to targeted proficiency levels. For example, you will find several kinds of workplace documents in the theme exercises. To gain leveling insight, review these documents as a collection, looking for the differences in leveling indicators (e.g., length, complexity, vocabulary).

Assessment

Both the theme activities (the first exercise in each level) and the practice problems (found at the end of each level) can be used to **evaluate learners' current skills**, because they address every skill covered in that level. Other uses for these tools include:

- Pre- and post-test
- Engagement (or introductory) activity for each level
- Post-level evaluation (i.e., confirm mastery before moving to next level)
- Culminating activity (distribute it last) to help learners integrate and assimilate skills

Hint. You may wish to combine some or all of the suggested uses.

- Practice test for an ACT Work Keys assessment
- General practice to develop skill proficiency/mastery

The learning activities suggested in the *For additional practice...* sections of the instructor guides can be used for evaluation purposes too.

Time Savers

You are encouraged to stop to review any of the information found in the "preparation station" whenever needed. The summary tables and matrix are designed to make it easy for you to quickly reference needed information. In addition, you are encouraged to customize the activities in this book according to your learners' needs and to design additional exercises from them.

Insert the "Improving to Level 3" Divider Here

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Improving to Level 3

Skills

Level 3 learners can demonstrate the skills outlined in the highlighted portion of the Reading for Information Skill Set table illustrated on p. 59.

Leveling

Indicators of Level 3 learning activities are listed in the highlighted portion of the Leveling Overview table found on p. 60.

Important! Remember that learners who cannot achieve Level 3 skills may need special remediation to overcome such challenges as a learning disability or English as a second language.

Reading for Infor

Level	Description		
		Identifying Main Ideas & Supporting Details	Unders V
Level 3	• Short, direct passage • Elementary vocabulary • Information clear & complete	Identify main idea & supporting details	• Recognize word(s) • Recognize not define position, t • Define wo (basic, no
Level 4	Level 3 skills plus: • Longer, more detailed & complex passage • Clear information; multiple factors to be considered • Elementary vocabulary that is slightly more difficult	Identify less obvious and/or embedded details; combine details	Use context t words not de
Level 5	Level 4 skills plus: • More detailed & complex passage • Covers broader topics	Same as Level 4, using more complex text	• Define tec acronyms, context; ap • Use contex words wit
Level 6	Level 5 skills plus: • Significantly more difficult text • Advanced vocabulary • Information not clearly stated	Extract & synthesize important information to find implied details	• Use critica define tec that are us • Use contex common r meaning w
Level 7	Level 6 skills plus: • Difficult & dense text • Complex concepts • Difficult vocabulary	Same as Level 6, using more difficult & dense text like regulatory and legal documents	• Use contex mon techn • Isolate me ating amon choosing r

mation Skill Set

Skill Categories		
tanding Word leanings	Applying Instructions	Applying Information & Reasoning
meaning of defined meaning of word(s) d that show order, me rk-related words t job-specific)	• Involves few and uncomplicated steps • Determine what to do and when	N/A
o find meanings of fined	• Involves several steps & complicated instructions, may include conditionals • Order steps, consider cause-effect relationships, & select correct action	Consider changing circumstances in making a decision for a described situation
nical terms, jargon, & from paraphrasing/ ply them correctly t to correctly define multiple meanings	Involves more steps &/or details; more variables; includes conditionals	Apply information to a similar, but undescribed situation
l thinking skills to nical terms & jargon ed out of context t to find the less neaning of multi-ord(s)	Same as Level 5, using more complicated text	• Apply complicated information to new situations • Determine general principles & rationale behind principles; generalize to related situations
t to define uncom-ical terms & jargon anings by discrimin-g context clues, nost important	Same as Level 6, using denser, complicated text	Determine general principles & generalize to unrelated & undescribed situations

Leveling O

Level Indicators	Level 3	Level 4	
Length	Short	Somewhat longer	
Complexity			
• **Detail**	Limited to needed information	More detailed than Level 3	Signif broad
• **Clear/orderly**	All information clear; no reading between lines	Some details implied; no reading between lines	No re more less c
• **Sentences**	Simple, short	Some complex sentences	Mixe comp
• **Paragraphs**	Short	→	Long
Vocabulary	Elementary; most words defined in text	Elementary, but more difficult; some undefined	Jargo techn
Instructions	Few steps; simple tasks	More steps; complicated instructions; may contain conditionals	Many at lea
Application	N/A	Consider changing circumstances in making decisions	Apply simil situa
Typical documents	Announcement; short memorandum; simple schedule or instructions	Job procedure with several steps	Healt offic

verview

Level 5	Level 6	Level 7
→	→	Long
icantly more detailed; der topics	More details; denser	More complex concepts
ading between lines; complex; somewhat rderly	Some reading between lines; less logical order	More reading between lines
l (some simple, some lex)	Complex, formal	Significantly longer, denser
r, more complex	→	Significantly longer, denser
n/multiple meaning/ ical words; defined	Advanced; jargon & technical terms; some undefined	Hard; legalese; unusual words
steps &/or details; st 1 conditional	Multiple steps & conditionals; complicated instructions	→
information in text to ar, but undescribed ion	Apply complicated guidelines to given & undescribed tasks; generalize to similar	Generalize to unrelated situations
h claims procedure; equipment manual	Simple contract; some city codes	Complex legal document; corporate tax guide

Materials

- Learning Activity 3.1 Learner Handout (pp. 63–64)

Skills Addressed

If learners complete all of the assignments contained in this learning activity, they will practice every Level 3 skill.

Prerequisite Skills and Activities

- Instructors are urged to assess learners' skill levels before providing instruction in Reading for Information skills. See Appendix C for more information.

- Provide at least two reading prerequisite activities before starting instruction in improving to Level 3. Silent reading and writing practice, as described in the Activities for Developing Prerequisite Reading Skills subsection (pp. 30–33) is especially helpful in preparing learners for improving to Level 3.

- Introduce learners to the case study used throughout the learning activities in this book (explained in the *Learning Activities Introduction* section, p. 54).

Instruction Methods

- You may wish to reproduce the Bay to Bay memorandum, inserting individual learners' names in the "To" line. Many companies would personalize a memo going to new employees.

- For Assignment #1, instruct learners to work in pairs. You may wish to use blindfolds and/or ask a few pairs to role play and explain how they completed the assignment.

- In Assignment #2, facilitate a class discussion in which learners answer the questions. Be sure to model strategies they can use to find the answers, including explaining your thinking processes. Help learners who answer the questions do the same.

- Use Assignment #2 to help learners develop questioning minds. As you facilitate the discussion, ask follow-up questions that get them to dig out additional information. For example, after learners name the three things already defined that they expect to learn about company policies, ask, "What else do you think you might learn at any company orientation?" You may wish to help learners create a K-W-L chart to answer this follow-up question in depth.

Answers

Assignment #1

What – Orientation
When – Monday June 1, 8:30 a.m. to 1 p.m.
Where – Bay to Bay Training Center, Dolphin Room
Who – All new employees
Why – Complete forms, learn about company policies, get uniforms

Assignment #2

1. Standard workplace language for water-related industries *(Hint: Help learners define this work-related word by picturing themselves boarding a cruise ship for their first assignment and the Captain saying, "Welcome Aboard!")*

2. To educate new employees about the company and conduct administrative tasks

3. What happens if I'm sick or want to take a vacation, how I get paid, information about customers

4. In the Bay to Bay Training Center on Surfer Highway

5. 4 hours

6. 4 hours *(Hint: Help learners recognize that the memo says nothing about travel pay.)*

Assignment #3

1. Report to the Dolphin Room at the Bay to Bay Training Center

2. Arrive by 8:30 a.m.

3. Participate in all orientation activities

For additional practice...

The learning activities in this book are intended to supplement a reading instruction curriculum. To become proficient, learners need to practice with a variety of workplace documents and job simulations. See the section titled **Where Do I Begin** (pp. 48–50) for more information and sample plans for developing a customized, comprehensive Reading for Information curriculum.

Learner Handout

MEMORANDUM

To: New employees

From: Joseph Connors, President
Bay to Bay Cruise Lines

Welcome aboard! I am pleased that you joined our Bay to Bay family, and I hope you'll remain with us for a long time to come.

Your first assignment is a four-hour company orientation—we'll show you the ropes. You'll receive uniforms, attend company policy explanations (e.g., attendance, vacation, customer relations), and complete necessary forms. Please attend as outlined below:

Monday, June 1
9 a.m. to 1 p.m.
Bay to Bay Training Center, Dolphin Room
14 East Surfer Highway, San Diego

You will be paid for the orientation time. Once again, welcome aboard!

Background

Bay to Bay offers barracks-style accommodations for its employees in their home city. They aren't fancy, but they're free! Your roommate, also a new employee, is blind (he will be operating dishwashers in the kitchen). You have volunteered to help him with paper communications until Bay to Bay finishes customizing an interpretation device that will translate all company documents into braille. Your roommate's name is Ben.

Assignment #1

Using the 5Ws, tell Ben the main idea and supporting details of the orientation memo.

Assignment #2

Answer the following questions:

1. Why did the president use the words *Welcome aboard*?
2. What is the purpose of a company orientation?
3. What can you expect to learn from the company policy discussions?
4. Where will you find the Dolphin Room?
5. How long will the orientation last?
6. How much will you be paid for attending the orientation?

Assignment #3

You and Ben decide to go to the orientation together. Using the 5Ws you created for Assignment #1, sit down together and plan what steps you need to take on Monday, June 1 (e.g., what you will do and when).

Materials

- Learning Activity 3.2 Learner Handout (p. 67)

Skills Addressed

- Category #1: **Identify main idea and supporting details**
- Category #3: Apply a few, uncomplicated steps*

**The design of Assignment #2 allows learners to practice applying Level 3 instructions (Skill Category #3) as they identify the main point and supporting details.*

Prerequisite Skills and Activities

If this is the first activity learners are completing in your Reading for Information curriculum, you are urged to implement the recommendations listed in the Prerequisite Skills and Activities section of the Instructor's Guide for Learning Activity 3.1 (p. 61).

Instruction Methods

To save time you can provide sample job ads. However, learners will experience increased motivation and a more realistic learning situation if they collect job ads for use in this activity.

Resources

In some cities, local employers, chambers of commerce—even television stations—provide job listings.

Answers

Assignment #2

- The main point of an employment ad is generally the position; however, watch for ads where the employer is the focal point (these often list several job positions). Be sure learners recognize the difference.
- Check that learners found all of the details and marked them correctly (i.e., job details in one color and company details in another).

For additional practice...

Have learners continue to locate and identify main ideas and supporting details by doing research about the hiring companies (e.g., Internet, call for company brochures, interview current employees). You can provide real-life practice in job seeking activities *and* motivate learners to do a quality job by providing a research target: "Before you run out and put in an application, find out whether this is the kind of working environment in which you want to work." Let learners share the knowledge they gained with one another, including how they gathered the information and their impressions/conclusions. Encourage learners who are listening to ask questions of the presenters. The discussion will both educate learners about the working environments of several local businesses and develop questioning skills.

Learning Activity 3.2—Get a Job!

Learner Handout

Background

You are graduating next month and you need to get a full-time job.

Assignment #1

Locate at least one employment advertisement and bring it to class. If possible, bring an entire employment section from a local and regional newspaper. Learners who exhibit additional effort for this assignment (e.g., find and print Internet job listings, copy job ads posted in local businesses) will receive bonus credit.

Assignment #2

1. Review the job ads collected and choose one that interests you—a job for which you would apply in real life.
2. **Circle** the main point of the ad.
3. **Underline** any details about the job you find in the ad.
4. Use a **different color** to **underline** anything you learned about the company from the ad.

Materials

- Learning Activity 3.3 Learner Handout (p. 70)
- Milkshake ingredients (see recipe in learner handout)
- Milkshake preparation tools (see recipe in learner handout)

Skills Addressed

- Category #2: **Recognizing meanings of defined word(s)**
- Category #2: **Recognizing meanings of undefined word(s) that show position, order, or time**
- Category #3: Applying instructions with few and uncomplicated steps

Instruction Methods

- Since this is a Level 3 activity, you may wish to review the recipe with the class, helping them define words. Modeling how to identify the meanings of undefined words may be helpful too.
- Have learners work in teams to make their milkshakes so they have to recalculate the recipe's measurements. As everyone enjoys their milkshakes, discuss the targeted terms (i.e. *liquefy*, *secure*, and *longer*) and the strategies used to define them. Help learners relate the strategies used to preparing other recipes.

Answers

1. *C* means cup or cups. The strategy used was the symbol clue (=).
2. *Liquefy* is a blender setting. Strategies used were proximity and symbol clues (i.e., defined in parentheses after the word).
3. *Secure* means make sure the lid is in correct position. The strategy used was context (i.e., lid and tightly).
4. *Longer* means more than 20 seconds. Strategies used were proximity and context (i.e., "20 seconds" is found in the previous sentence, whether it is too thick).

In addition, you may wish to check the word definitions and calculations on learners' handouts.

For additional practice:

- Have learners complete a reflective writing assignment that describes the processes they used to define unfamiliar words in the milkshake recipe.
- Provide additional recipes for learners to follow for a homework assignment. Have them write a similar reflective essay for each additional recipe completed.

Learning Activity 3.3—Milkshakes from Scratch

Learner Handout

Milkshakes from Scratch

1 c milk
2 scoops (approximately 2 c) ice cream
Blender

Put your favorite flavor of ice cream in a blender. Add milk. Secure lid tightly and liquefy (blender setting). Check thickness after about 20 seconds. Liquefy longer if shake remains too thick. Add more ice cream if shake is too thin. Pour into glass. Yield: 1 serving

Hints: For multiple servings, multiply measurements by the number of servings desired. C = cup(s).

Assignment

Work with your teammates to make yourselves some milkshakes. In the space provided below, write the definitions of any unfamiliar words and show your measurement calculations.

Learning Activity 3.4—Wordy Scavenger Hunt

Materials

- Learning Activity 3.4 Learner Handout (p. 73)

Skills Addressed

- Category #2: **Defining work-related words (basic, not job-specific)**
- Category #2: Recognizing meanings of defined word(s)
- Category #3: Applying instructions with few and uncomplicated steps

Prerequisite Skills and Activities

Learners should be familiar with the concept of defining words.

Instruction Methods

- Help learners get the most out of this assignment by grading their final products so they will be more likely to exert serious effort in completing them.
- Organize learners into teams of 2–4 and assign a section of the words list to each team, or assign 3–5 words to individual learners. If your class is large enough, duplicate the assignments so that learners can compare and contrast their samples and definitions after completing the assignment. If comparing results is not possible, have learners present their findings, facilitating a discussion after each presentation that allows those listening to brainstorm several ways to apply the knowledge gained. To save time, let two teams present to one another and write a list of the ideas they brainstorm.

Hint: Customize the word list by including terms used by businesses located in and around your city.

Important! Facilitate this assignment carefully so that learners focus on discovering real-life examples and applications of these terms instead of writing definitions for a list of words.

Resources

You may wish to suggest that learners see guidance counselors for career guidance materials (e.g., brochures, tests, computerized job search data), job information sites on the Internet, newspaper employment ads, and similar career resources.

Answers

For maximum learning, have learners use a dictionary to check the accuracy of their answers and change them accordingly. Important! Wait until **after** learners submit their papers to disclose this step in the assignment.

Hint: Give learners an opportunity to challenge the dictionary definition. In the workplace, words are not always used according to the dictionary definition.

For additional practice...

Have learners combine their papers to create a scrapbook of general job terms. Encourage creativity (e.g., computer graphics, actual samples). When the scrapbook is complete, suggest that learners give it to a community group of their choice, such as their school library or career class, a grade school library or classroom, a preschool, an orphanage, or a school for special needs children.

Learning Activity 3.4—Wordy Scavenger Hunt

Learner Handout

Typical Workplace Words

ADA
Applicant
Application
Awards
Benefits
Compensation
Customer service
Department
Drug testing
EEOC
Efficiency
Employee
Employment testing
Fiscal year
Grievance
HR
Just-in-time inventory
Performance review
Policies
Production
Quality
Regulations
Reimbursement
Services
Sick leave
Suggestion (employee)
Supervisor
Teamwork
Timecard
Training
Union
Work

Assignment

Take your list on a scavenger hunt to find examples of how the words are used in books, magazines, brochures—anywhere you can find them. Collect at least one example for each word you were given. Use the examples to write a working definition for each word. (For purposes of this assignment, a working definition is a few words or a sentence that describes the word in a way that someone could read it and understand how to use it to complete a related task.) Be sure to include your sample passages or documents with your definitions.

Learning Activity 3.5—Announcing Health Care

Materials

- Learning Activity 3.5 Learner Handout (p. 75)

Skills Addressed

- Category #3: **Applying instructions with few, uncomplicated steps**
- Category #2: Defining work-related words (basic, not job-specific)
- Category #2: Recognizing meanings of defined word(s)

Instruction Methods

Choose one of these alternatives:

- Put the announcement on an overhead and facilitate a class discussion about the response steps.
- Distribute the handout as a homework assignment to be completed individually.
- Use the assignment as an engagement activity to prepare learners to practice applying instructions. See the subsection titled "Skill Category #3: Applying Instructions" (pp. 39–41) for activity ideas.

Answers

1. Go to Human Resources
2. See Sue Brown
3. Complete form(s)
4. Return form(s) ASAP, but no later than 5 p.m. on 9/15

Note: If learners combine some steps, check to be sure all four task elements are included.

Learning Activity 3.5—Announcing Health Care

Learner Handout

Open Enrollment – Sign Up Now!

This year's OE* period for the company health plan runs from **September 1 - September 15**.

See Sue Brown in Human Resources for a form.

Be sure to return it **no later than September 15 at 5 p.m!**

**If you did not enroll in the company health plan at hiring and want to join now, you must complete and return the necessary forms during this period. There is only one OE period per year.*

Assignment

You want to enroll in the company health plan and decide to do so immediately after your shift. List below the steps you will take to accomplish this goal.

Learning Activity 3.6—Want to Sign Up?

Materials

- Learning Activity 3.6 Learner Handout (p. 77)
- Announcement in Learning Activity 3.5 Learner Handout (p. 75)

Skills Addressed

- Category #3: **Determining what to do and when**
- Category #1: Identify main idea and supporting details

Instruction Methods

You may wish to let learners work in pairs or teams of three, assigning one of the scenarios in the assignment to each.

Answers

1. No. Sue is already enrolled.
2. Mary needs to see Sue Brown, complete a form, and return it by the deadline.
3. This announcement does not deal directly with John's situation. He should visit Sue Brown to ask or review his written company policy.
4. No. Tom can enroll when he's hired.

For additional practice...

Have learners collect announcements from the newspaper, the learning environment, extra-curricular activities, and the workplace (if possible). Let them practice Category #3 skills weekly or bi-weekly by selecting an announcement and listing the steps needed to respond, in order.

Learning Activity 3.6—Want to Sign Up?

Learner Handout

Assignment

Put yourself in the shoes of each person described in the scenarios below. Use the announcement in Learning Activity 3.5 to answer each question.

1. Susan Smith joined the company on August 12th. She enrolled in the health plan during orientation. Does she need to do anything now? Explain.

2. Mary Smith joined the company on August 12th too. She didn't enroll in the health plan because she was covered under her father's plan. Her father retired on September 1st and his retirement plan has no health coverage. If Mary wants health coverage, what should she do?

3. John Jacobs is already enrolled in the company health benefits program. He plans to marry on September 30th. Does he have to wait until next year to enroll his wife?

4. Tom Adams will join the company on October 1st. Does he have to wait until next year to enroll?

Level 3 Practice Problems

These practice problems resemble those found in the Work Keys Reading for Information assessment. Circle the correct answer for each item.

Use the Bay to Bay orientation memorandum in Learning Activity 3.1 to answer questions 1–4.

1. The **major** reason the president sent this memorandum was to:
   A. Welcome new employees.
   B. Define the nature of orientation for new employees.
   C. Give new employees their first assignment—attending orientation.
   D. Give himself a power stroke.
   E. Tell employees about the new training center.

2. As demonstrated by this memo, most new employees experience some form of:
   A. First-day jitters.
   B. Job training.
   C. Orientation.
   D. Indoctrination.
   E. Company welcome.

3. How many hours will your paycheck reflect for this event?
   A. 2
   B. 4
   C. 5
   D. 0
   E. 4.5

4. To apply the instructions for attending the orientation, you need to:
   A. Report to the Dolphin Room at the Bay to Bay Training Center.
   B. Arrive by 8:30 a.m.
   C. Participate in all orientation activities.
   D. Do A, B, and C.
   E. Do only A and B.

Use the recipe in Learning Activity 3.3 to answer questions 5–7.

5. What does c mean?
   A. Can
   B. Cup
   C. Cups
   D. Cup or cups
   E. Cans

6. What does the word *liquefy* indicate?
   A. A setting on the blender
   B. Stirring the ingredients until they form a liquid
   C. Shaking the ingredients until they form a liquid
   D. Melting the ingredients on a stove
   E. Letting the ingredients melt at room temperature

7. How long is *longer* (in the fifth sentence)?
   A. 25 seconds
   B. 30 seconds
   C. More than 20 seconds
   D. 40 seconds
   E. 45 seconds

8. What does a company mean by the word *compensation*?
   A. Salary
   B. Paycheck
   C. Salary and all benefits that can be given monetary value
   D. Hourly pay
   E. Return on its investment

9. The acronym *HR* is so common in the workplace that many consider it a word. What does it mean?
   A. Health Ryder
   B. Hydraulic Robot
   C. Help Resources
   D. Human Resources department
   E. Health Resources department

10. Which of the following is **not** a topic workers would typically find covered in company policy documents?
   A. Drug testing
   B. Hiring
   C. Grievances
   D. Annual company picnic
   E. Sick time

Use the OE announcement in Learning Activity 3.5 to answer questions 11 and 12.

11. Employees who have not enrolled in the health care plan, but want to, should:
    A. Fill out a form
    B. Go see Sue Brown
    C. Go see Sue Brown and complete a form
    D. Go see Sue Brown, complete a form, and return it by the deadline
    E. Nothing

12. When should they do it?
    A. Now
    B. Whenever they get around to it
    C. No later than 5 p.m. on September 15
    D. No later than 5 p.m. on September 1
    E. Nothing to do, so no deadline

Answers to Level 3 Practice Problems

	Answer	Skill Category
1.	C	#1
2.	C	#1
3.	B	#1
4.	D	#1
5.	D	#2
6.	A	#2
7.	C	#2
8.	C	#2
9.	D	#2
10.	D	#2
11.	D	#3
12.	C	#3

Notes

Insert the "Improving to Level 4" Divider Here

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Improving to Level 4

Skills

Level 4 learners can demonstrate the skills outlined in the highlighted portion of the Reading for Information Skill Set table illustrated on p. 85.

Leveling

Indicators of Level 4 learning activities are listed in the highlighted portion of the Leveling Overview table found on p. 86.

Reading for Infor

Level	Description		
		Identifying Main Ideas & Supporting Details	**Under**
Level 3	• Short, direct passage • Elementary vocabulary • Information clear & complete	Identify main idea & supporting details	• Recogniz word(s) • Recogniz not defin position. • Define wo (basic, no
Level 4	Level 3 skills plus: • Longer, more detailed & complex passage • Clear information; multiple factors to be considered • Elementary vocabulary that is slightly more difficult	**Identify less obvious and/or embedded details; combine details**	**Use context words not**
Level 5	Level 4 skills plus: • More detailed & complex passage • Covers broader topics	Same as Level 4, using more complex text	• Define te acronyms context; a • Use conte words wi
Level 6	Level 5 skills plus: • Significantly more difficult text • Advanced vocabulary • Information not clearly stated	Extract & synthesize important information to find implied details	• Use critic define te that are • Use conte common meaning
Level 7	Level 6 skills plus: • Difficult & dense text • Complex concepts • Difficult vocabulary	Same as Level 6, using more difficult & dense text like regulatory and legal documents	• Use conte mon tech • Isolate m ating am choosing

rmation Skill Set

Skill Categories		
standing Word Meanings	**Applying Instructions**	**Applying Information & Reasoning**
meaning of defined meaning of word(s) d that show order, ime rk-related words t job-specific)	• Involves few and uncomplicated steps • Determine what to do and when	N/A
to find meanings of defined	• Involves several steps & complicated instructions; may include conditionals • Order steps, consider cause-effect relationships, & select correct action	Consider changing circumstances in making a decision for a described situation
hnical terms, jargon, & from paraphrasing/ pply them correctly xt to correctly define h multiple meanings	Involves more steps &/or details, more variables, includes conditionals	Apply information to a similar, but undescribed situation
al thinking skills to hnical terms & jargon sed out of context xt to find the less meaning of multi-word(s)	Same as Level 5, using more complicated text	• Apply complicated information to new situations • Determine general principles & rationale behind principles; generalize to related situations
xt to define uncom-nical terms & jargon eanings by discrimin-ng context clues, most important	Same as Level 6, using denser, complicated text	Determine general principles & generalize to unrelated & undescribed situations

Leveling			
Level Indicators	**Level 3**	**Level 4**	
Length	Short	Somewhat longer	
Complexity			
• **Detail**	Limited to needed information	More detailed than Level 3	Si b
• **Clear/orderly**	All information clear; no reading between lines	Some details implied; no reading between lines	N n le
• **Sentences**	Simple, short	Some complex sentences	M c
• **Paragraphs**	Short	→	L
Vocabulary	Elementary; most words defined in text	Elementary, but more difficult; some undefined	Ja te
Instructions	Few steps; simple tasks	More steps; complicated instructions; may contain conditionals	M at
Application	N/A	Consider changing circumstances in making decisions	A si si
Typical documents	Announcement; short memorandum; simple schedule or instructions	Job procedure with several steps	H ol

Overview

Level 5	Level 6	Level 7
→	→	Long
gnificantly more detailed; roader topics	More details; denser	More complex concepts
o reading between lines; ore complex; somewhat ss orderly	Some reading between lines; less logical order	More reading between lines
ixed (some simple, some mplex)	Complex, formal	Significantly longer, denser
nger, more complex	→	Significantly longer, denser
rgon/multiple meaning/ chnical words; defined	Advanced; jargon & technical terms; some undefined	Hard; legalese; unusual words
any steps &/or details; least 1 conditional	Multiple steps & conditionals; complicated instructions	→
pply information in text to milar, but undescribed tuation	Apply complicated guidelines to given & undescribed tasks; generalize to similar	Generalize to unrelated situations
ealth claims procedure; ffice equipment manual	Simple contract; some city codes	Complex legal document; corporate tax guide

Materials

- Learning Activity 4.1 Learner Handout (pp. 90–91)
- Cue sheets for server and Greg St. Clair conversation (p. 92)

Skills Addressed

If learners complete all of the assignments contained in this learning activity, they will practice each Level 4 skill and reinforce Level 3 skills.

Prerequisite Skills and Activities

Demonstrated competence in all Level 3 Reading for Information skills

Instruction Methods

- For *Assignment #1*, arrange learners in teams of 3–4 and let them "hang out" to complete the exercise together.
- When implemented as a class discussion, *Assignment #2* offers a good opportunity to model questioning and critical thinking skills, as they are applied in using context to determine the meanings of undefined words.
- Let learners work in pairs to complete *Assignment #3*. Observe the pairs during the role plays and facilitate, as needed. *(Hint: To maximize the learning potential of this activity, distribute learners' roles* ***separately*** *so they are unaware of one another's strategies for the interaction.)*
- Organize learners into "Greg" teams and "server" teams to complete *Assignment #4*. Facilitate a debriefing of the assignment. Help each team discuss the order of the steps and the rationale behind that order. Then help learners explain the cause-effect relationships identified.

Answers

Assignment #1

Four themes can be found in the training schedule. You may wish to give extra credit to learners who find four instead of three.

1. Practice must be important because we are given lots of it.

2. Customers must be very important because the Captain is teaching on that topic and we are given very specific instructions about handling people and special requests.

3. We are being prepared to serve in a variety of situations.

4. The company is spending a great deal of time and expense to prepare us for our jobs.

Assignment #2

1. New servers

2. Debrief means to evaluate the rookies and give them feedback. Q & A refers to a time for rookies to ask questions. The key difference is the responsibilities of the rookies in each situation—they listen (and take notes!) during the debriefing and they seek more input during the Q & A. In other words, during the debriefing they are passive, while during the Q & A they are active participants.

Assignment #4

1. Each team member must share his/her experience.

2. As members' share, the listeners should take notes, looking for what went right and what could have gone better.

3. Discuss needs for improvement, including the cause-and-effect aspects of your situations (e.g., Greg's comments, although intended as a joke, caused the server to resist suggesting a solution).

4. Discuss together what, if anything, each Greg needs to do next.

Review each course of action the teams selected for appropriateness; be sure to model your thinking processes for learners.

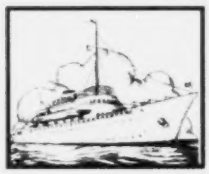
For additional practice...

- The training schedule activity provides an excellent opportunity for expansion activities that will help learners practice Reading for Information skills. For example, **build an activity around the staff dinner**. Have a few learners role play it for the class, i.e., some serve, others eat then give the debriefing, servers ask questions, the class answers. You can enter this activity at any place in the process; for example, you may wish to provide a narrative about the rookies' service so you can start the role play with the debriefing. Have listeners take notes as they listen to the staff members' feedback and let them work in pairs or teams to develop follow-up questions. Working with the narrative, taking notes, and writing questions all develop Reading for Information skills, as well as critical thinking skills that are an important prerequisite for gaining competence in higher-level reading skills.

- The staff dinner scenario is but one of **many practice opportunities** provided by this lesson. So put on your thinking cap and have fun!

- Expand upon Assignment #4 by arranging a debate between the Gregs and the server teams. Establish ground rules like each team must take notes and withhold comments until **both** teams complete their presentations.

Learner Handout



Staff Memorandum

From: Madeline Adams, Captain
The Pacific Princess

To: New Servers

Subject: Training Schedule

Date: March 30, 1999

I enjoyed meeting each one of you during Orientation. Your first cruise ship assignment begins next Friday, April 12th. You are assigned to The Pacific Princess. To prepare for your first cruise, please report to the Pacific Princess for server training on Monday, April 8th at 7:30 a.m. The details of your 4-day training schedule are outlined in the schedule below. Our ship is docked one-half mile south of the Bay to Bay Training Center.

Server Training Schedule

	Monday	Tuesday	Wednesday	Thursday	Friday
A.M.	Captain's Welcome Boat Regulations for Servers	How to serve: • Formal dinner • Drinks & desserts Practice time	In-cabin service Serving officers Practice time	[Noon start time]	All aboard! (Sailing time: 10 a.m.)
P.M.	How to serve: • Continental breakfast • Buffet lunch Practice time	Taking orders Pitching in—setting & clearing tables Practice time	Handling special requests and special customers Practice time	Service—Our #1 Job (by Capt. Adams) Practice time—what to do if... Staff dinner ("rookies" serve) Debriefing; Q & A	

Training will begin at 7:30 a.m. and end at 4 p.m. each day, except Thursday. To cover the staff dinner, you will report at noon and work until 8:30 p.m. Lunch will be provided all four days by Bay to Bay. If you have any questions about your training, please contact your supervisor, Greg St. James at 99S-ERVE.

Assignment #1

You are hanging out in the staff lounge at your barracks, drinking a soda. Some other rookie servers arrive and you end up discussing your upcoming training. Work together to list three key **themes** found running through your training schedule.

Assignment #2

Answer questions 1 and 2 below. Do **not** use a dictionary.

1. To whom is Capt. Adams referring when the memo speaks of *rookies*?

2. What do you think will happen at the debriefing? During the Q & A? How are the two different?

Assignment #3

This is a role play assignment. You are playing the role of a new server. You are scheduled for some medical tests on Wednesday. You called your doctor as soon as you received the schedule, but your condition is **potentially** serious, so she doesn't want you to wait until you return from your cruise. According to the Captain's memo, your next step is to talk to Greg St. James. Using the information provided in the attached narrative, role play that conversation with a team member. (Your teammate will play the role of Greg St. James.) Feel free to improvise!

Assignment #4

In your team, discuss your conversations about the testing conflict for Wednesday's training. Follow these four steps to complete your discussion:

1. Discuss needs for improvement, including the cause-and-effect aspects of your situations (e.g., Greg's comments, although intended as a joke, caused the server to resist suggesting a solution).

2. Discuss together what, if anything, each Greg needs to do next.

3. As each member shares his/her experience, the listeners should take notes, looking for what went right and what could have gone better.

4. Each team member must share his/her experience.

You may have realized that these steps are not ordered for the most productive discussion. So, reorder the steps first. Then follow them. Be prepared to share your findings and decisions.

Assignment #3: Role Play Information

Server Cue Sheet

Be polite and apologetic. Use any serious condition you desire, as long as it fits the situation outlined. Express concern about the training you will miss and insist upon finding a way to make it up (e.g., self-study).

Assignment #3: Role Play Information

Greg St. James Cue Sheet

Generally, you are a nice guy. You support your staff, but you don't let people walk all over you. Thus, ask questions in the beginning to make sure your server is being truthful with you. Check out his/her story if you like, but don't make the server feel that you do not believe or trust him/her because that would damage your working relationship. Be willing to work with the server to make-up the training, but **do not** provide the solution. You are to facilitate and encourage, make the final decision, and provide necessary support—but not fix the problem. Help the server take the initiative to suggest solutions. (Note: Postponing either the training or the testing is **not** an option.)

Assignment #3: Role Play Information

Server Cue Sheet

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Learning Activity 4.2—Dixie's New Product

Materials

- Learning Activity 4.2 Learner Handout (p. 95)

Skills Addressed

- Category #1: **Identifying main idea and supporting details**
- Category #2: Using context to find meanings of words not defined

Prerequisite Skills and Activities

- Demonstrated competence in all Level 3 Reading for Information skills
- Working knowledge of visual organizers

Instruction Methods

- Organize learners into teams of 2–4. Have each use a different visual organizer (see explanations on pp. 34–35) to complete *Assignment #1*.
- Have learners work in pairs to complete *Assignment #2*, playing the role of the manager and the assistant manager. Instruct learners **not** to use Dixie's memo in their discussions. And have team members exchange roles so that both learners practice retelling skills. (An explanation of retelling can be found on p. 35.)

  After the exercise, facilitate a discussion in which you help learners recognize that they used *retelling* skills to identify less obvious and/or embedded details in Dixie's memo. Try to get them to realize that they used *visual organizers* to do the same and to combine details (i.e., Level 4, Category #1 skills).

Answers

Assignment #1

- Check the visual organizers for (a) accurate and complete content and (b) correct use of the tool. Visual organizers should contain all necessary information in a logical combination. A sample is provided, but learners may find different, but equally suitable ways to organize the information.

Inventory:	Plan storage for new cups and straws Plan storage for daily delivery of liquid ingredients
Store:	Plan placement of marketing items (e.g., hang new cup displays, replace table tents) Determine most efficient service location for ingredients, cups, and straws Rearrange service area to accommodate, if needed Confirm that the product is added to cash registers
People:	Explain new product, including purpose (i.e., draw café customers) Explain all preparations; assign new tasks (e.g., storage, preparation) Distribute recipe, demonstrate making new product, let workers practice making it Let workers test cash registers Assign task of placing marketing items

- Organizing the information will help me identify less obvious details and combine all the information into usable form. In addition, I can use the visual organizer to share the information with others and make a preparation plan for my store.

Assignment #2

Observe learners' role plays. You may wish to use a checklist to determine whether they provided all the necessary information, evaluate learners' Level 4 skills, and give learners' feedback about the exercise and their progress toward Reading for Information learning goals.

For additional practice...

If time allows, have learners present their visual organizers to the class. Facilitate a compare-and-contrast discussion.

Learning Activity 4.2—Dixie's New Product

Learner Handout

Dixie-Gram

From: Dixie Thomas, Chairman
To: All U.S. Dixie's Store Managers
Re: New Product
Date: March 15, 2000

Congratulations, folks, on our strong year-end results for 1999. Holiday sales beat all previous years, so please enjoy the enclosed bonus check with our thanks.

Our corporation is tiptoeing into the café market this summer with an additional milkshake product—Café Freeze. Café Freeze will be served in a special cup with an espresso-flavored straw.

We want to test customer response before moving deeper into this market, so we won't install espresso machines yet. We have devised a daily delivery system for the ingredients needed; you will receive a fresh supply by 10 a.m. daily. As always, the new product will be programmed into your cash registers through the network at HQs.

Someone from HQs will contact you shortly to schedule a time to brief you, and deliver the recipe and a practice batch of Café Freeze ingredients. In addition, you will receive the marketing tools (e.g., table tents, hanging cups) and everything else you'll need to prepare for our June 1, 2000 kick-off of Café Freeze. Please get both your store and your associates ready.

Assignment #1

You are the store manager, so you have to get the store and your people ready for the new product. Use a visual organizer to separate and categorize the information in Dixie's memo. Then answer the following question:

- How did organizing the information in Dixie's memo help you prepare your store and your people?

Assignment #2

In a role play, brief your assistant manager about the new product.

Learning Activity 4.3—Angry Flyers

Materials

- Learning Activity 4.3 Learner Handout (p. 98)

Skills Addressed

- Category #2: **Using context to find meanings of words not defined**
- Category #1: Identifying main idea and supporting details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 3 Reading for Information skills
- Working knowledge of defining words through context

Instruction Methods

- Have learners follow the steps listed in completing Learning Activity 4.3.

    1. Complete the handout individually.
    2. Record what they are visualizing.
    3. Describe aloud what they pictured for both an isolated gate and an angry person.

- For Step 3, ask for volunteers and have them describe their angry person images, encouraging them to share where/how they obtained the prior knowledge that allows them to picture an angry person (e.g., movies, television).
- End the discussion by encouraging learners to recognize that they used *visualization* to find the meanings of words not defined in the passage. Help them name other strategies they used in this learning activity. *(Hint: Do not discuss answers to the fill-in questions. Instead, collect learners' completed handouts to evaluate individual skill proficiency.)*

Answers

1. Descriptions will vary, but should contain phrases like *away from other people, unpopulated, in the far corners of the terminal,* and *unable to be seen by other employees or security.*

2. Enter, exit

3. Button, desk, door

4. Tone of voice, body language

5. Descriptions will vary, but should contain words like *yelling, red faced, harsh tones,* and *cursing.*

For additional practice...

Ask learners to locate and bring in announcements from their daily activities (e.g., soccer try-outs, meetings, voter bulletins). Have them practice identifying visual clues and using other strategies for understanding word meanings to define words in the announcements.

Learning Activity 4.3—Angry Flyers

Learner Handout

Safety Alert

In recent months, more customers are exhibiting rageful behavior toward ticket agents. The Columbus Port Authority has taken steps to ensure the safety of ticket agents confronted by angry customers, including posting additional security officers. Please cooperate with our efforts by following these instructions:

1. **Don't panic** when confronted by an angry customer. Often, you can de-escalate the situation by maintaining a calm voice and body language.

2. If the agitated customer persists, tell him/her, "Let me contact my supervisor to help you." Be sure to use a sincere and kind tone. **Do not talk down** to the customer because he is likely to become more agitated.

3. If working at an **isolated gate**, always keep another employee with you. If no one from your airlines is available, contact security for back-up coverage.

4. If a flyer continues to escalate, push the silent alarm. If you suspect a weapon, push the alarm **immediately**.

Assignment

1. Describe an isolated gate.

2. Based on the visualization you did in item 1, ticket agents meet customers as they _____ and _____ a plane.

3. Again, based on your visualization, a silent alarm is probably a _____ located either at the check-in _____ or by the _____.

4. If an agent feels panicky, a customer will know by _____ and by _____.

5. Using your prior knowledge and/or experience with angry people, list some behaviors and/or body language that would indicate a flyer is feeling rageful.

Materials

- Learning Activity 4.4 Learner Handout (p. 101)
- Jane & Joshua Homes Employee Market Research handout (p. 102)

Skills Addressed

- Category #3: **Applying complicated instructions with several steps**
- Category #1: Identifying the main idea and supporting details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 3 Reading for Information skills
- Working knowledge of following instructions that contain several steps

Instruction Methods

You may wish to have learners work in teams of 2–4 to complete this assignment. For wider experience and increased variety, provide a different scenario for each team. For example, have one team research builders, another research rental properties, and so on.

Resources

- Additional research resources include your local chamber of commerce, Better Business Bureau, and construction trade associations. Learners can collect brochures from each construction company too.
- For additional practice activities, ask the suppliers of office and related equipment found in your learning environment to let learners assist with cleaning and regular maintenance checks. Be sure the suppliers bring their step-by-step instructions for learners to follow.

Answers

Confirm that learners followed the instructions correctly and completely. Data collected is not relevant to this exercise; however, learners will use it in completing Learning Activity 4.5.

For additional practice...

Give learners regular opportunities to follow complicated instructions that simulate workplace situations. For example, tell them to create food items from complicated recipes, conduct cleaning and maintenance checks on office equipment, and follow manual instructions to use computer programs.

Learner Handout

Jane & Joshua Homes
16 East Main Street • Columbus, IN 45214

January 15, 2000

Dear participating employees:

Thank you for volunteering to participate in our company-wide market test project. You will be paid 3 hours of overtime to complete the tasks listed below.

1. Find 3 of our competitors on the Internet or in other resources (e.g., telephone directory).
2. Review their offerings (e.g., price, selection, locations) as though you are a prospective buyer.
3. Conduct a telephone interview with each company, if needed.
4. Compare the competitors' offerings to those provided by Jane & Joshua Homes.
5. Write your findings on the attached form and return it to me.

As our president explained when he presented this market research project, we are asking employees to complete our survey because you are a safe audience—we are less likely to lose your business to competitors! The very best way to help our company is to be completely honest in your feedback. Your honest information will guide us in making changes that will bring Jane & Joshua Homes back to #1 in the Columbus market.

Sincerely,

Joshua Newman

Joshua Newman
Vice President

Assignment

You are a participating employee. Conduct the research, as instructed, and complete the form.

Jane & Joshua Homes Employee Market Research

Company Name	Selection	Base Price	Locations	Other offerings (e.g., time to build, options)	Preference* (with 1 being the best)
Jane & Joshua Homes	7 basic styles; 3 options within each style	$112,000 and up	Northwest, east, north suburbs	24-hour on-line problem support	

**Do not select Jane & Joshua Homes as your first choice out of loyalty. Only make us first if, as an unbiased buyer, you would prefer us for your home builder.*

Materials

- Learning Activity 4.5 Learner Handout (p. 105)

Skills Addressed

- Category #3: **Considering cause-effect relationships and selecting correct action**
- Category #4: Considering changing circumstances in making a decision

Prerequisite Skills and Activities

- Demonstrated competence in all Level 3 Reading for Information skills
- Before conducting this activity, have learners practice managing cause-effect situations by playing board or team games that require such analysis to make the correct choice, as well as the consideration of changing circumstances. Chess is an excellent game to use for practicing these skills.

Instruction Methods

Engage learners in the activity by having them use the forms they created in Learning Activity 4.4 to debate the pros and cons of using each builder. Then challenge them with several "what-if" scenarios like those listed on Learner Handout 4.5. Facilitate the debate to help learners identify the cause-effect relationships involved and how to use those relationships in making a decision.

Answers

The debate issues and the best courses of action will differ based on the learners' research. Here are some sample answers:

1. I would buy from a company that builds in the south or negotiate with Jane & Joshua Homes to start a development there.
2. Jane & Joshua Homes's 24-hour on-line service will mean nothing to me.
3. I am likely to choose the cheapest home, but will probably respond to free options and similar special deals.

4. Price is the most important factor, but that doesn't mean the cheapest price. We want the best deal for our money, so we are likely to choose the company that gives us the most features for our money.

5. I would choose the builder that has a reputation for meeting deadlines (not just says he's fastest, but actually delivers on time).

For additional practice...

Let learners make-up additional scenarios for the debate. Encourage them to use the basic five cases, but change the circumstances slightly. Working with these changed circumstances allows them to practice considering changing circumstances in making decisions (Category #4 skill).

Learning Activity 4.5—Decisions, Decisions

Learner Handout

Assignment

Put yourself in the shoes of each buyer described in the following scenarios. Using the forms you completed for the market research project in Learning Activity 4.4, consider the pros and cons and decide which builder to use. Be prepared to support each choice.

1. A consumer loves the styles offered by Jane & Joshua Homes, but has to live in the south side of town for access to specialized child care.

2. A buyer is computer illiterate.

3. A buyer has a limited down payment, so price is everything.

4. A newlywed couple wants to keep a 20% margin in their budget because they are committed to living beneath their means. However, they want to get the most for their money.

5. A buyer can pay cash for a home, but wants it finished no later than 12 weeks after the start date.

Learning Activity 4.6—Performance

Materials

- Learning Activity 4.6 Learner Handout (p. 108)
- Key Performance Competencies (p. 109)

Skills Addressed

- Category #1: **Considering changing circumstances in making a decision**
- Category #2: Using context to find meanings of words not defined

Prerequisite Skills and Activities

Demonstrated competence in all Level 3 Reading for Information skills

Instruction Methods

- Prior to implementing this activity, complete an Employee Performance Evaluation for each learner. (If possible or practical, have two classmates complete an evaluation for each learner—anonymously.)
- Have learners complete *Assignment #1* individually.
- When all learners have completed Assignment #1, distribute your evaluation (and any completed by classmates) to each learner and instruct them to complete *Assignment #2*.
- Facilitate a discussion that allows learners to share how they considered changing circumstances (i.e., additional, objective information about their learning performance), then made a decision. Help learners brainstorm workplace situations that might require them to use this same process. Example: New information surfaces about the most efficient way to complete a job task, so you update the relevant job procedures.

Answers

Check learners' responses to Assignments #1 and #2 to ensure they were able to use the new information to make correct decisions. In addition, use these exercises to confirm learners' understanding of their learning goals and needs.

For additional practice...

Ask learners to collect copies of performance evaluations from family members, friends, the Internet, and similar sources. Review the forms as a class, comparing and contrasting the terms used against the words and definitions found in the Key Performance Competencies handout. Have learners work in teams to create their own performance evaluations, customized for real-life situations such as performance in soccer practice, a recital, volunteer work, parenting duties, and class teams.

Learner Handout

Employee Performance Evaluation

KEY: 5 = Sustains superior job performance
4 = Consistently exceeds job requirements
3 = Meets job requirements
2 = Partially meets job requirements; may be new employee
1 = Performance consistently falls below minimum job requirements

Attitude	5	4	3	2	1
Communication	5	4	3	2	1
Customer Service Orientation	5	4	3	2	1
Decisions (Judgement/Innovation)	5	4	3	2	1
Initiative	5	4	3	2	1
Planning, Organizing, Problem Solving	5	4	3	2	1
Teamwork	5	4	3	2	1
Technical/Professional Knowledge	5	4	3	2	1

Comments _____

_____

Assignment #1

1. Review the definitions of the Key Performance Competencies (see p. 109), noting how they relate to the performance evaluation above.
2. Consider your performance with the Reading for Information activities completed thus far. Use the Employee Performance Evaluation to evaluate your efforts. Note: For purposes of this exercise, your instructor and fellow learners are your customers.
3. What, if anything, do you want to change so that you can improve your "learning performance?"

Assignment #2

Compare your self-assessment to those you received from your instructor and two classmates. Do you want to change your answer in Assignment #1, step 3 after receiving the new information from your instructor and classmates? Explain.

Key Performance Competencies

Judgement/Innovation

How well does the employee generate creative solutions to work situations; trying different and novel ways to deal with organizational problems and opportunities.

Teamwork

How well does the employee promote the team spirit of working together and being cooperative; provide problem resolution expertise and contribution of effort; and support team decisions.

Technical/Professional Knowledge

Has the employee achieved a satisfactory level of technical and professional skills/knowledge in job-related areas; keeping abreast of current developments and trends in area of expertise.

Effective Communications

How well does the employee communicate both verbally and written in all types of situations to provide clear, concise, candid, and factual information in an appropriate manner.

Initiative

How well does the employee take the initiative to make things happen or try new concepts on his/her job; contribute to the overall continuous improvement of the company and maintain or acquire additional skills to adapt to changing job requirements.

Planning and Organizing / Problem Solving

How well does the employee plan and organize his/her work; use his/her time to find creative, unique, and efficient ways to solve difficult and complex problems.

Customer Service Orientation

How well does the employee build relationships with internal and external customer/partners/employees through courtesy in giving assistance, and/or placing proper importance on identifying, clarifying, and meeting needs which will exceed their expectations.

Attitude

How well does the employee display a positive, supportive, and cooperative attitude toward the company's policies and procedures, strategic business plans, department responsibilities or functions, being truthful, tactful, considerate, etc. as well as demonstrating leadership initiatives.

Level 4 Practice Problems

These practice problems resemble those found in the Work Keys Reading for Information assessment. Circle the correct answer for each item.

1. When used in business, what does the term *rookie* typically mean?
   A. Chess piece
   B. New job
   C. Inexperienced employee
   D. New manager
   E. Workplace celebration

2. Using Greg St. James' cue sheet (p. 92), which is **not** a factor that he needs to consider in managing the scheduling conflict?
   A. Whether or not the server is telling the truth
   B. The seriousness of the server's illness
   C. Whether family members can be with the server for the tests
   D. How the server can get the necessary training
   E. How missing some training might affect customers on the upcoming cruise

3. Which paragraph in the Dixie-Gram (p. 95) could be eliminated entirely without losing any information necessary for completing the task?
   A. First
   B. Second
   C. Third
   D. Fourth
   E. Fifth

4. After reviewing the Safety Alert (p. 98), choose which statement below uses a *contrasting statement* to define rageful behavior.
   A. If a flyer continues to escalate, push the silent alarm.
   B. Don't panic when confronted by an angry customer.
   C. If working at an isolated gate, always keep another employee with you.
   D. Often you can de-escalate the situation by maintaining a calm voice and body language.
   E. Do not talk down to the customer because he is likely to become more agitated.

5. According to the Safety Alert passage, someone who is *isolated* would be:
   A. Positioned away from other workers.
   B. Positioned away from security personnel and cameras.
   C. Situated in a distant area of the terminal.
   D. Situated in an area that leaves him/her alone with customers.
   E. Any or all of the above.

Use the following recipe to answer questions 6–7:

STRAWBERRY LASAGNA

1 yellow cake mix
2 (10 oz.) pkg. frozen strawberries, thawed
4 tbsp. lemon juice
2 tbsp. flour
1 qt. fresh strawberries, sliced
2 (8 oz.) pkg. cream cheese, at room temperature
2 (3 oz.) pkg. instant vanilla pudding
4 c. milk
2 tsp. vanilla
1 (16 oz.) container Cool Whip

Need a deep 9x13 inch serving pan to put together contents of cake. Prepare cake mix and bake in a 9x13 inch pan. Remove from pan, cool.

Combine thawed strawberries, lemon juice and flour in saucepan. (I add 1/2 cup sugar.) Cook over medium heat until thickens. Remove from heat and cool. After cooled, fold in fresh sliced berries and set aside.

In a bowl, combine instant vanilla pudding and vanilla and 2 cups milk. Beat with mixer and add cream cheese, then add 2 more cups milk. Beat until smooth, set aside.

Cut cake in half horizontally to make 2 layers. Place one layer in pan and spread half of cream cheese and pudding mix on, then half of strawberries, then half of Cool Whip and repeat layers. Refrigerate and enjoy.

6. To make Strawberry Lasagna, what must be prepared first?
   A. The strawberry mixture
   B. The pudding and cream cheese mixture
   C. The cake
   D. The cake and the strawberry mixture
   E. The Cool Whip

7. By reading the directions to the end of the recipe, you know that the lasagna is topped with:
   A. A layer of yellow cake.
   B. A layer of the strawberries.
   C. A layer of the pudding and cream cheese mixture.
   D. A layer of Cool Whip.
   E. A layer of 1/2 of the strawberry mixture and 1/2 of the pudding and cream cheese mixture.

Use the following passage to answer the remaining problems:

> *An architect designed an office complex for a law firm. Since the building is for private business rather than government use, the architect did not include standard wheelchair accessibility in the design. The week before the architect was to present his plans to the law firm's Board of Directors, the chairperson suffered a transportation-related injury that left him paralyzed from the waist down. After considering his alternatives, the architect decided to build a second, partial model (showing only the front and back entrances) that includes wheelchair accessibility. He also added a second set of figures to the cost pages in his proposal to show the additional costs to be incurred with the second design option.*

8. The lawyers welcomed the additional option. In fact, they chose to spend the extra money to make their new building wheelchair accessible. What factor probably *caused* the attorneys' openness to spend more money for wheelchair accessibility?
   A. The architect's outstanding presentation skills
   B. The relatively small cost of making the building wheelchair accessible
   C. The chairperson's accident
   D. The permanent disability that resulted from the chairperson's accident
   E. The community-minded nature of the lawyers

9. What *effect* will this decision probably have on the disabled community?
   A. Persons in wheelchairs will have an accessible attorney.
   B. Persons in wheelchairs will gain increased understanding from the legal community.
   C. Nothing is likely to change.
   D. Both A and B above.
   E. The lawyers will drive legislation that requires **all** buildings to be wheelchair accessible.

10. Why did the architect change his presentation in these ways?
   A. He wants to make more money.
   B. He is exhibiting strong customer service skills.
   C. He considered the cause-effect relationship created by the chairperson's injuries.
   D. He considered and responded to the changing circumstances created by the chairperson's accident.
   E. Both C and D above.

Answers to Level 4 Practice Problems

	Answer	Skill Category
1.	C	#2
2.	C	#1
3.	A	#1
4.	D	#2
5.	E	#2 and 3
6.	C	#3
7.	E	#3
8.	D	#3 and 4
9.	D	#3
10.	E	#4

Notes

Insert the "Improving to Level 5" Divider Here

Improving to Level 5

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Improving to Level 5

Skills

Level 5 learners can demonstrate the skills outlined in the highlighted portion of the Reading for Information Skill Set table illustrated on p. 117.

Leveling

Indicators of Level 5 learning activities are listed in the highlighted portion of the Leveling Overview table found on p. 118.

Reading for Infor

Level	Description	Identifying Main Ideas & Supporting Details	Unders M
Level 3	• Short, direct passage • Elementary vocabulary • Information clear & complete	Identify main idea & supporting details	• Recognize word(s) • Recognize not define position, ti • Define wo (basic, no
Level 4	Level 3 skills plus: • Longer, more detailed & complex passage • Clear information; multiple factors to be considered • Elementary vocabulary that is slightly more difficult	Identify less obvious and/or embedded details; combine details	Use context t words not de
Level 5	Level 4 skills plus: • More detailed & complex passage • Covers broader topics	Same as Level 4, using more complex text	• Define tec acronyms, context; ap • Use conte words wit
Level 6	Level 5 skills plus: • Significantly more difficult text • Advanced vocabulary • Information not clearly stated	Extract & synthesize important information to find implied details	• Use critica define tec that are us • Use contex common n meaning w
Level 7	Level 6 skills plus: • Difficult & dense text • Complex concepts • Difficult vocabulary	Same as Level 6, using more difficult & dense text like regulatory and legal documents	• Use contex mon techn • Isolate me ating amor choosing n

mation Skill Set

Skill Categories		
tanding Word leanings	Applying Instructions	Applying Information & Reasoning
meaning of defined meaning of word(s) l that show order. me k-related words job-specific)	• Involves few and uncomplicated steps • Determine what to do and when	N/A
o find meanings of fined	• Involves several steps & complicated instructions; may include conditionals • Order steps, consider cause-effect relationships, & select correct action	Consider changing circumstances in making a decision for a described situation
nical terms, jargon, & from paraphrasing/ ply them correctly t to correctly define a multiple meanings	Involves more steps &/or details, more variables; includes conditionals	Apply information to a similar, but undescribed situation
l thinking skills to nical terms & jargon ed out of context t to find the less neaning of multi-ord(s)	Same as Level 5, using more complicated text	• Apply complicated information to new situations • Determine general principles & rationale behind principles; generalize to related situations
t to define uncom-ical terms & jargon anings by discrimin-g context clues, nost important	Same as Level 6, using denser, complicated text	Determine general principles & generalize to unrelated & undescribed situations

Leveling			
Level Indicators	**Level 3**	**Level 4**	
Length	Short	Somewhat longer	
Complexity			
• **Detail**	Limited to needed information	More detailed than Level 3	Si br
• **Clear/orderly**	All information clear; no reading between lines	Some details implied; no reading between lines	No mo les
• **Sentences**	Simple, short	Some complex sentences	Mi co
• **Paragraphs**	Short	→	Lo
Vocabulary	Elementary; most words defined in text	Elementary, but more difficult; some undefined	Ja te
Instructions	Few steps; simple tasks	More steps; complicated instructions; may contain conditionals	Ma at
Application	N/A	Consider changing circumstances in making decisions	Ap sir sit
Typical documents	Announcement; short memorandum; simple schedule or instructions	Job procedure with several steps	He off

Overview

Level 5	Level 6	Level 7
→	→	Long
gnificantly more detailed, oader topics	More details; denser	More complex concepts
reading between lines; ore complex; somewhat s orderly	Some reading between lines; less logical order	More reading between lines
ixed (some simple, some mplex)	Complex, formal	Significantly longer, denser
nger, more complex	→	Significantly longer, denser
rgon/multiple meaning/ chnical words; defined	Advanced; jargon & technical terms; some undefined	Hard; legalese; unusual words
any steps &/or details; least 1 conditional	Multiple steps & conditionals; complicated instructions	→
ply information in text to nilar, but undescribed uation	Apply complicated guidelines to given & undescribed tasks; generalize to similar	Generalize to unrelated situations
ealth claims procedure; fice equipment manual	Simple contract; some city codes	Complex legal document; corporate tax guide

Materials

- Learning Activity 5.1 Learner Handout (pp. 122–124)

Skills Addressed

If learners complete all of the assignments contained in this learning activity, they will practice each Level 5 skill and reinforce skills contained in Levels 3 and 4.

Prerequisite Skills and Activities

- Demonstrated competence in all Level 4 Reading for Information skills

Instruction Methods

- To save time and give learners an opportunity to consider several ways to organize the information provided, have them complete *Assignment #1* for homework. Let learners demonstrate the use of different organizational tools by sharing their assignment results with one another.

- Have learners complete *Assignment #2* individually, then swap papers for scoring. As you check the answers as a class, lead learners in discussing how they chose the answers (e.g., context clues used, prior knowledge, dictionary). In addition, help learners identify the types of words defined (i.e., acronyms, multiple-meaning words, jargon, technical terms).

- Have fun with *Assignment #2* by letting learners role play each statement in front of the class.

- If completed individually, *Assignment #3* offers an excellent opportunity to assess learners' skills in identifying details and applying instructions.

- *Assignment #4* works well as a team assignment. Give each team a different scenario and instruct each team to discuss the scenario and determine the correct course of action. If time permits and the class disagrees about the correct solution to one or more scenarios, arrange a debate.

- For *Assignment #5*, ask learners to describe their situations and solutions. After each presentation, help listeners give feedback (e.g., Were the Bon Voyage! guidelines used? Were they applied correctly? Are the situation and solution realistic?). To save time, have learners work in pairs or small teams to create one situation and solution per team. Alternative: *Assignment #5* could be implemented as a reflective writing assignment.

Answers

Assignment #1

Check the visual organizers for (a) accurate and complete content, and (b) correct use of the tool. Visual organizers should contain all necessary information in a logical order and combination. A sample outline is provided; however, learners may find different but equally suitable ways to organize the information.

A. Major goal—give servers SOPs for reporting for work (a cruise)
   1. Keep instructions until memorize

B. Details
   1. Arrival
      –At noon
      –To galley
      –Check-in personally with Greg St. James
      –Sign board in galley

   2. Living arrangements
      –Find CD topside
      –Find cabin in CQ
      –Stow gear
      –Dress in uniform
      –Report to DR

   3. What ifs
      –Run into Captain and she wants your help
         –Always stop whatever doing and do it
         –Report by intercom to Greg if task requires more than 15 minutes
      –Can't find CD
         –Return to galley
         –Stow gear in dish locker
      –Might get seasick
         –Get pills from sick bay
         –Stop on way back to DR
         –Must take 1 hour before sailing

   4. Call Greg if any questions

Hint: Learners may cite the schedule as the point of the memo. Help them recognize that Greg St. James states his purpose for the ***memo*** *in the first paragraph.*

Assignment #2

1b, 2a, 3b, 4a, 5a, 6b, 7b, 8a, 9b

Assignment #3

I could write a list of the steps and conditions (similar to the sample outline provided in the answer to *Assignment #1*) or verbally provide the steps as the rookie writes the list. This is the most permanent solution since I can't make a copy of my memo because I don't have it with me. In addition, the Captain made the request, so I drop what I'm doing to respond.

Assignment #4

1. I take the passenger to his cabin, stopping at the first intercom to inform Greg (this task is likely to take more than 15 minutes). I stop at sick bay on the way back, taking my chances that I will get the pills into my system within the hour time limit. Alternative: If I can pass sick bay on the way to the passenger's cabin, I might be able to take the pills on the way to the gentleman's cabin. This detour is an option only **if** I sense the passenger wouldn't be offended by making it **and if** I can politely request his permission.

2. I stow my gear in the galley and get my cabin assignment later. Although I have time to go to the dock and speak with the CD, I would have to go against the flow of passenger traffic to do so. Since customer service is the most important factor in my job (I learned this from the Captain's session during my training), moving through the customers with my gear in tow is not a good option.

3. I'm running out of time, so I head for sick bay, then the galley. And I need to stop avoiding the Captain. If I run into her and she makes a request that takes more than 15 minutes, I'll just call Greg on the intercom.

Assignment #5

Evaluate learners' presentations or writing assignments with criteria such as:

- Were the Bon Voyage! guidelines used?
- Were they applied correctly?
- Are the situation and solution realistic?

For additional practice...

Tell learners to write case studies like those found in Assignment #4. Have them swap cases and solve them, using the guidelines found in the Bon Voyage! memo.

Learner Handout

To: All New Servers

From: Greg St. James, Food Service Supervisor

In the future, you'll receive a schedule each month like the one below. We give instructions with the first schedule only; keep them and use them until you can commit our SOPs to memory.

All servers must report to the galley by noon on sailing day (the first day of the cruise). Be sure to check-in with me before storing your gear in the CQ. After signing in on the board in the galley, go topside and find the Cruise Director. He or she will have your cabin assignments. After you see the CD, find your cabin, stow your gear, and suit up! Then report to the DR to begin set-up for the Welcome Tea.

Sound easy? Good because it *usually* is. Occasionally something unexpected happens. Use these guidelines to help you out of unexpected situations:

- If you ever **run** into the Captain and she asks you to do something, drop whatever you are doing and just do it! Then return to the tasks you were performing. If the Captain's request will take more than 15 minutes, find an intercom and let me know about your delay.
- If the CD can't be located (sometimes he/she is called away from the ship to handle passenger needs on the dock), stow your gear in the dish locker behind the galley.
- Think you might get seasick? Report to sick bay (center starboard) on your way back to the DR. Doc's pills really work, **if** taken at least one hour before sailing.

Questions? Concerns? Give me a call. See you on the 12th!

April Work Schedule for New Servers

Dates	Ship Assignment	Cruise Type
4/12 to 4/15	Pacific Princess	Weekend Getaway
4/19 to 4/22	Pacific Princess	Weekend Getaway
4/26 to 5/1	Queen's Cruiser	Golden Gate Tour

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Assignment #1

Hint. You may wish to use cohesive ties for this task. (Information about cohesive ties can be found on p. 34.)

Technology fails again! Your blind roommate can't access his schedule on the special equipment provided by the company, so you read your memo from Greg St. James to him. But there's so much information and so many details, he can't grasp it without something **he** can read. Take a few minutes to organize the information in an outline or other visual organizer of your choice. Then dictate (a) the major goal of the memo and (b) **all** of the details contained in the memo (organized by category) to your roommate. He will key the information into his device as you provide it.

Assignment #2

The hallways at the staff barracks are filled with excitement about the upcoming cruise. Your fellow servers are having a great time throwing around the sea jargon found in the memo. You can tell they aren't sure what some of the words mean because their usage sometimes doesn't make sense. Choose which statement in each pair is used **most** accurately. (**If all other methods for defining words fail**, use a dictionary.)

1a. Get some SOPs to deal with this mess!
1b. I have a lousy memory, so I'm keeping my copy of the SOPs in my wallet.

2a. I'm going to the galley to sneak a snack. Wanna come?
2b. Are you ready to check the galleys on that publication?

3a. Got a date downtown, boys. Bon Voyage!
3b. Get a grip, Scott. *Bon Voyage* is <u>our</u> line. Have a nice trip!

4a. I wonder if all crew members stay in the CQ.
4b. I wonder if we're allowed to spend those CQs at the casino during the cruise.

5a. Fireworks tonight. Anyone going topside to watch them?
5b. Better polish those shoes again. Topside isn't shining.

6a. Can we take a CD to the DR during set-up?
6b. Can you believe it? I actually found the CD in the DR.

7a. Did they dock your pay for that dental appointment?
7b. The Pacific Princess always "parks" at Dock 7.

8a. If it's on the left, it's starboard.
8b. No way. Starboard is the side of the ship that the stars shine on.

9a. What do you call a big hole you can use when you need to upchuck? Sick bay!
9b. I've got a major headache. Can I go to sick bay for some aspirin?

Assignment #3

The Captain catches you as you board the ship and asks you to show a new server the ropes. She was hired this morning, so she hasn't had the training and didn't receive instructions or an April schedule. You don't have your schedule with you. If your goal is to teach this rookie just one time, what is your **best** course of action? Explain.

Assignment #4

Based on the information provided in the memo from Greg St. James, what action should you take in each of the following case studies?

1. You are dressed and on your way to the DR. You're planning to stop by sick bay for sea sick pills, but you run into the Captain before you get there and she asks you to help an elderly man with a cane get to his cabin—on the far side of the ship. What will you do and how will you get your medication?

2. You've been looking for the CD for 20 minutes. Finally, you spot her standing on the dock shuffling papers. No one is with her, but a line of passengers is boarding the ship between you and her. What's your **best** course of action and why?

3. You have to be back in the DR for set-up by 1 p.m. It's 12:45 p.m. and you just found the CD. You have your cabin assignment. CQ is a 5-minute trek—if you don't get lost. Considering that you often get car sick, you ought to stop by sick bay. You have managed to avoid the Captain twice in the last 30 minutes by turning around and heading another direction (and you got lost both times). Considering that this is your first day on the job, what's your best course of action and why?

Assignment #5

Explain how you would apply the guidelines for handling unexpected situations found in the Bon Voyage! memo to a similar situation you have experienced at school, on the job, or at home (i.e., a time when your best laid plans fell apart and you had to "punt.")

Learning Activity 5.2—Working Terms

Materials

- Learning Activity 5.2 Learner Handout (p. 127)

Skills Addressed

- Category #1: **Identifying main idea and supporting details**
- Category #2: Defining acronyms, jargon, and technical terms and using them correctly

Prerequisite Skills and Activities

- Demonstrated competence in all Level 4 Reading for Information skills
- Familiarity with the use of cognitive operations

Instruction Methods

Hint: Instructors are encouraged to use Learning Activity 5.2 as an evaluation of learners' levels of competence in identifying main ideas and supporting details.

- Have learners complete Activity 5.2 individually with an appropriate time limit. (Note: The instructions are written in narrative form rather than numbered steps so that learners can practice Level 5 skills.)
- You may wish to review some of the stronger examples of both using *cognitive operations* and *rewriting* the passage as a class. This class review will help learners improve their ability to discern the main ideas and supporting details within a complex passage, and how clearer and more concise passages make it easier to discern these items.

Answers

- The following key uses cohesive ties to join like information and excludes unnecessary information by enclosing it in brackets. Categories represented by the cohesive ties are: (1) acronym definition, (2) acronym types, (3) acronym application, (4) technical term definition (by example), and (5) technical term application.

[Generally speaking], an acronym is a word formed from the first letters of words found in a phrase or title. A [very] common example is *USA*, [which stands for *United States of America*]. Acronyms are used frequently in business. Some are common in all workplaces, others are specific to an industry or a company. Still others are used only in a specific department.

Business people like acronyms because they allow them to communicate faster—fewer syllables to write or say. In most cases, [it is not necessary for workers to know what the letters in workplace acronyms represent]. Knowing what the acronym means is enough. [For example], HR stands for Human Resources, but workers don't need to know those words. They [simply] need to know that HR is the department that handles employee-related tasks such as payroll, benefits, and performance evaluations.

Technical terms are [becoming increasingly] common [in the workplace]. [For example], many computer-related terms that were found only in the brains of engineers are now uttered by preschoolers! [Again, knowing the formal definitions of such terms is not mandatory.] Most employees simply need a working knowledge of technical terms so they can apply them correctly [in completing daily job duties].

- Learners can rewrite the passage in a variety of ways. Encourage creativity by rewarding it, while ensuring increased clarity and a more concise passage.

- The main idea of the passage is that acronyms and technical terms are used a lot in the workplace. Key details about acronyms include the definition of an acronym, that they can be both general and workplace department-specific, and that the ability to apply them correctly is more important than knowing what the letters in the acronym represent. Key details for technical terms include that a working knowledge of technical terms is more important than knowing the definitions.

For additional practice...

Ask learners to explain (retell) about acronyms and technical terms in the workplace to parents, classmates, friends, and/or siblings. Have them write a reflective essay (1–2 paragraphs) about the reactions they received to their explanations.

Learning Activity 5.2—Working Terms

Learner Handout

Generally speaking, an acronym is a word formed from the first letters of words found in a phrase or title. A very common example is *USA*, which stands for *United States of America*. Acronyms are used frequently in business. Some are common in all workplaces, others are specific to an industry or a company. Still others are used only in a specific department.

Business people like acronyms because they allow them to communicate faster—fewer syllables to write or say. In most cases, it is not necessary for workers to know what the letters in workplace acronyms represent. Knowing what the acronym means is enough. For example, HR stands for Human Resources, but workers don't need to know those words. They simply need to know that HR is the department that handles employee-related tasks such as payroll, benefits, and performance evaluations.

Technical terms are becoming increasingly common in the workplace. For example, many computer-related terms that were found only in the brains of engineers are now uttered by preschoolers! Again, knowing the formal definitions of such terms is not mandatory. Most employees simply need a working knowledge of technical terms so they can apply them correctly in completing daily job duties.

Assignment

Using a red pen, apply two cognitive operations—join and exclude—to the foregoing passage. Then rewrite the passage to make it clearer and more concise. Before turning in your revised version of the passage, highlight or circle the main ideas and underline the important details.

Materials

- Learning Activity 5.3 Learner Handout (pp. 130–131)
- The narrative about acronyms (Learning Activity 5.2 Learner Handout) *(optional)*

Skills Addressed

- Category #2: **Defining acronyms, jargon, and technical terms and using them correctly**
- Category #1: Identifying main idea and supporting details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 4 Reading for Information skills
- Working knowledge of the term *acronym*

Instruction Methods

- You may wish to have learners review the narrative that explains acronyms and technical terms before they complete *Assignment #1*.
- For *Assignment #2*, have learners work in pairs to explain what each term means. Be sure they take turns. **Important!** Instruct learners to take a few minutes to write down their definitions before working with their teammates.

Answers

Assignment #1

1. E-mail
2. Voice mail
3. Flashpoint
4. EAP (employee assistance program)
5. MT (maintenance)
6. JIT (just-in-time)
7. CRT
8. Right-sizing
9. 5Ws
10. Hazmat (hazardous materials)
11. CD
12. User-friendly
13. SOPs
14. QC (quality control)
15. Optimum

Assignment #2

Check learners' written definitions for accuracy.

For additional practice...

Give learners a research project: have them search for jargon, technical terms, and acronyms associated with their current or favorite careers. For the exercise "product," instruct them to provide a picture and word definition for each term (they should find 3–5 terms for each of the three categories). Encourage learners to be creative in choosing a presentation genre (e.g., slides, video, photographs, computer graphics).

Learner Handout

Assignment #1

Check your knowledge of common workplace terms by completing this matching exercise.

CRT	CD	optimum	5Ws
e-mail	voice mail	SOP	right-sizing
MT	flashpoint	EAP	QC
hazmat	user-friendly		JIT

1. For a quick, informal communication, I'd use _____.
2. _____ saves on switchboard resources, but it causes another problem—telephone tag!
3. _____ is the point at which a robot sparks to form a weld.
4. An employee who loses his spouse in a plane crash or someone whose drug test comes back positive might get assistance from the _____.
5. In a factory that runs on three shifts, the _____ team must do its work on the weekends.
6. _____ delivery saves companies millions of dollars in inventory-related expenses.
7. A computer terminal (or _____, as it was once called) can be found at almost every work station.
8. Increased competition from the world market has forced companies to find ways to work more efficiently, resulting in leaner workforces or _____.
9. The _____ is one of the most popular analysis tools used in the workplace.
10. If a chemical spill occurs, the _____ team should be notified immediately.
11. Storage capacity and endurance make the _____ preferable to the floppy disk.

12. The smart computer software supplier makes its programs _____.

13. Studies show that worker efficiency and job satisfaction increase when _____ are used in the workplace.

14. Today's customers demand a high quality product, so _____ functions have become integrated into all facets of a company's operations.

15. To survive in today's world marketplace, most companies place _____ efficiency in one of the top five spots on their goals lists.

Assignment #2

Write a working definition of each term listed in Assignment #1.

Materials

- Learning Activity 5.4 Learner Handout (p. 134)
- Page 1 of the *EasyTech Systems Manual* (p. 135)

Skills Addressed

- Category #2: **Defining multiple-meaning words and using them correctly**
- Category #4: Applying information to a similar, undescribed situation

Prerequisite Skills and Activities

- Demonstrated competence in all Level 4 Reading for Information skills
- Familiarity with the concept of multiple-meaning words
- Knowledge of workplace quality standards for written documents

Instruction Methods

- You may wish to have learners review the narrative that explains acronyms and technical terms before they complete *Assignment #1*. In addition, this activity is a good opportunity to help learners practice **workplace quality standards**. Have them produce the sentences on a computer, use spell- and grammar-check features, and proofread their papers to ensure high quality results.
- *Assignment #2* can be completed individually or in teams of 2–4 learners. Real-life teamwork could be experienced in this exercise by letting learners form their own teams (i.e., let them find others in the class with similar job interests.) Give learners significant practice with multiple-meaning words by letting each learner take every quiz created by the class. If the assignment is completed individually, learners could receive 20–30 quizzes; let them complete one a day for a month.

Answers

Assignment #1

When correcting sentences, reduce grades for sloppy, haphazard work as well as inaccuracies. Give bonus points for professional presentation like bulleted sentences and bolded terms.

Assignment #2

Check learners' quizzes and answer sheets for accuracy *before* they distribute them to classmates. You may wish to let the originators "grade" the quizzes.

For additional practice...

Hint. The practice activity lets learners work with several Level 5 Reading for Information skills, including applying complicated instructions.

Have learners use their terms from Assignment #2 to create a training document like the computer language list from the EasyTech Systems manual. Explain the following scenario for the project:

- You are adult workers.
- Your company is involved in a worksite mentoring program in which high school students spend time with you to learn about the company and your jobs.
- One part of your job in hosting the mentees is to give each high school student a company "lingo" orientation.
- The term lists from Assignment #2 are part of that orientation.

Encourage learners to put themselves in the shoes of the high school mentees—what tools would help them learn this information easily, retain it, and enjoy the learning?

Learner Handout

Assignment #1

The attached page comes from the EasyTech Systems start-up manual. All of the words they listed have multiple meanings. Write at least two sentences for each term. The first sentence should use the word in its computer language context; the second sentence should use the same word in its English language or traditional context. You may write additional sentences for other meanings of the words, as available. Here's a sample, using the term *wired*:

1. Now that everyone in the building is **wired**, I hope our ability to keep everyone informed about projects improves.

2. The electrician got that lamp **wired** in no time at all.

3. After three large espressos, that guy is really **wired**!

Assignment #2

Find five words that specifically relate to your current job field or your favorite career and that have multiple meanings. Create a matching quiz that contains the five words and ten fill-in sentences (two for each term). Make an answer sheet for your quiz.

Introduction

Welcome to the world of computers! Many of our customers are first-time users. If that's you, this introduction was written especially for you.

First, it is important to learn **computer language**. Some of the most common terms and their *working* definitions are listed for you here. Don't worry if you don't understand all of these terms. They will become familiar as you use your computer. As you follow the start-up procedures in the succeeding chapters, refer back to this list whenever you come across a term that confuses you.

Bar A "strip" across the top or along the side of a program window that shows icons (pictures) for a function (example: ***I*** = italics)

Boot Slang for starting a program or turning on a computer

Button Typically an icon (picture) on a bar, also a button on a mouse

Click Press a mouse button (typically located at the top of a mouse) to select a function, open a menu, place the cursor, etc.

Dialog Boxes that appear when you hover over an icon or function button; box contains a definition of the function

Drive Mechanical part; the hard (or internal) drive holds data and processes all computer program commands, and other drives (typically A drive and/or D drive) accept CDs and floppy disks

End A key on the keyboard; when pushed, cursor moves to end of line or page

Home A key on the keyboard; when pushed, cursor moves to beginning of line or page

Keys The "buttons" on a computer keyboard

Mouse Movement control device; sits alongside computer and as you roll it and click with it, you move the cursor and select items on the screen (Note: It's shape and "tail" make it look like a mouse)

Menu A list of options that "rolls" open when you click on bar items (Example: click on "file" to access options like print, save, etc.)

Program Brains of the computer—programs contain commands that speak to the computer and tell it what to do

Window What you see on the screen; like a picture that you can move around and select items in

Learning Activity 5.5—Doing Donations

Instructor's Guide

Materials

- Learning Activity 5.5 Learner Handout (p. 138)
- Page from In-House SOP Manual (p. 139)

Skills Addressed

- Category =3: **Applying instructions that contain several steps/details, variables, and conditionals**
- Category =2: Applying technical terms, jargon, and acronyms correctly

Prerequisite Skills and Activities

- Demonstrated competence in all Level 4 Reading for Information skills
- Learners should be given practice in applying jargon, acronyms, and technical terms before completing this learning activity.

Instruction Methods

- This is an excellent opportunity for learners to simulate the way teams work on the job. Put 3–5 learners in each team and assign one case to each team. Have the teams present their findings and instructions (or flowcharts) to the class. Facilitate a discussion that helps learners compare results between teams with the same case. If you have only three teams, help learners provide feedback to teams about the quality of the analysis and instructions.
- In the workplace document used for this exercise, *SOP* stands for *Standard Operating Procedures*. Give a short pop quiz (i.e., What does SOP mean?) to determine whether learners recognized this definition.

Answers

Case #1

1. Perform medical history and physical exam according to SOP Section 8.0
2. Explain the informed consent agreement and AIDS materials
3. Provide private opportunity to self-exclude
4. Review donor's laboratory data and collection
5. Determine donor safety and suitability records
   Conditional: Notify Center Physician if screening shows positive; provide counseling to donor
   Conditional: Provide Tetanus immunization, if donor is a participant in that program
6. Monitor donor reactions during procedure
   Conditional: Initiate emergency medical procedures, if needed
7. Assist in maintaining quality control

Case #2

1. Perform medical history and physical exam according to SOP Section 8.0
2. Explain the informed consent agreement and AIDS materials
3. Provide private opportunity to self-exclude
4. Review donor's laboratory data and collection records
5. Determine donor safety and suitability records
6. Notify Center Physician of elevated ALT
7. Provide counseling to donor
8. Refer donor to medical facilities via appropriate medical supervision
9. Provide final report of incident to Center Physician

Case #3

1. Explain to the nurse technician that you are responsible for making sure that all staff members have adequate CPR and first aid knowledge and skills. (This occurs before the seizure.)
2. Evaluate the condition of the donor who is experiencing a seizure
   Conditional: Initiate emergency medical procedures, if needed
   Conditional: Refer donor to medical facilities via appropriate medical supervision, if needed
3. Report situation and steps taken to Center Physician

For additional practice...

Have learners create additional case situations and practice applying the guidelines from the In-House SOP Manual to them.

Learner Handout

Assignment

Using the Physician Substitute page from the In-House SOP Manual, write a list of instructions or create a flowchart that explains what you would do in each of the following cases. Be sure to include "what-if" situations.

Case #1: A regular blood donor comes to the clinic. He's hasn't donated for about six months.

Case #2: While performing the standard procedures on the blood donor in Case #1, you find elevated ALT. The donor becomes very upset about the news.

Case #3: A new nurse technician reports for work on your shift. She says that she's had CPR training. At the same time, a donor falls to the floor in what looks like a seizure.

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USA BLOOD DONOR BANK	IN-HOUSE SOP MANUAL
SUBJECT: PHYSICIAN SUBSTITUTE TRAINING PROGRAM	ISSUE DATE: 12/15/97

5.0 DUTIES OF PHYSICIAN SUBSTITUTE.

5.1 Perform the medical history and physical examination on new regular donors and all other donors as outlined in SOP Section 8.0. Provide a thorough and clear explanation of the informed consent agreement and the AIDS educational material which includes high risk behavior information. Afford the donors the opportunity to self-exclude in a private setting.

5.2 Determine donor safety and suitability when screening values fall into the borderline areas or when the donor has been off the program for any length of time.

5.3 Evaluate donor reactions and initiate emergency medical procedures as needed.

5.4 Assist in the routine daily processing of donors at the discretion of the Center Manager.

5.5 Refer unstable donors to medical facilities as necessary via appropriate medical supervision, such as ambulance or paramedical services.

5.6 Review all donor laboratory data and collection records, as required in 21 CFR 640.65, to determine the donor's continued safety and suitability.

5.7 Provide counseling for donors who have tested positive for Anti-HIV, HBsAg, Anti-HCV, STS, Elevated ALT and other positive tests.

5.8 Perform immunizations on donors participating in the Tetanus immunization programs as required by the SOP Manual.

5.9 Act as liaison between the Interstate Blood Bank Companies and the medical community.

5.10 Be responsible for assisting in the donor center quality control program.

5.11 Be responsible for teaching the donor center staff CPR and first aid.

5.12 Notify the **CENTER PHYSICIAN** as soon as possible of any donor reaction or incident.

5.13 Under no circumstances is the **PHYSICIAN SUBSTITUTE** to treat donors or donor center staff for any illness or injury not directly related to the plasmapheresis procedure.

Learning Activity 5.6—More Donations

Materials

- Learning Activity 5.6 Learner Handout (pp. 142–143)
- In-House SOP Manual page from Learning Activity 5.5 (p. 139)

Skills Addressed

- Category #1: **Applying information to a similar, undescribed situation**
- Category #3: Applying instructions that contain several steps, details, variables, and conditionals

Prerequisite Skills and Activities

- Demonstrated competence in all Level 4 Reading for Information skills
- Provide practice in thought problems, brain teasers, and similar activities (for thinking skills) to prepare learners for this learning activity.

Instruction Methods

- You may wish to model some of the thinking processes required for applying information to similar, undescribed situations by going over the first two questions in *Assignment #1* as a class. The modeling will help prepare learners for the challenge they face in Assignment #2.
- Instruct learners to work in pairs or teams of 2–3 to complete *Assignment #2* so they can share the challenge—they will be less likely to become frustrated and mentally shut down. Create a safe environment for learners to move beyond present performance levels and/or comfort zones by (a) not grading this assignment, (b) giving plenty of time for discovery, (c) monitoring teams and giving helpful hints when needed, and (d) providing encouragement when learners make mistakes in thinking through the problem.

Answers

Assignment #1

1. F (While I may not need to train this staff member, I must confirm his/her skills and knowledge.)
2. T
3. T
4. F (Guideline 5.7 states, "Provide counseling..." Thus, I may need to bring in a professional counselor or refer a highly agitated donor to an appropriate medical facility.)
5. F (Guideline 5.13 clearly states that I am not to treat donors for anything not directly related to the donation procedure.)
6. T

Assignment #2

Evaluate the case studies, providing encouragement and suggestions. Ask learners to edit/correct their case studies based on the feedback provided. If your learners are usually critical or competitive toward one another, you may **not** wish to have them evaluate one another's work.

For additional practice...

Instruct learners to swap the cases they created for Assignment #2 and solve them.

Learning Activity 5.6—More Donations

Learner Handout

Assignment #1

You are a substitute physician. Use the guidelines contained in the In-House SOP Manual (from Learning Activity 5.5) to determine whether each statement is true or false. Mark each accordingly in the box at the left. For any items you mark *false*, **explain why** you believe the statement is false in the space provided after each question.

☐ 1. If a staff member produces a certificate that shows he just completed a CPR and first aid course, I've satisfied my responsibilities under item 5.11

☐ 2. A representative from a local hospital calls with a question about one of our donors. It's my job to talk with her.

☐ 3. When I refer a donor to medical facilities, it is my job to make sure someone like ambulance personnel or paramedics take him or her there.

☐ 4. When a donor's test comes back positive, I must counsel him or her myself.

☐ 5. A regular donor arrives for his weekly appointment with a broken finger. I take a few moments to set it for him because he is such a good customer.

☐ 6. I follow the SOP Manual when giving a Tetanus shot to a qualified donor.

Assignment #2

Using the In-House SOP Manual, create a case study for the physician substitute. It must include at least three "what-if" situations **and** a minimum of five specific instructions for the physician substitute to follow. The case could consist of a morning in a physician substitute's life, listing several situations he/she might face. Or it can cover a single donor or incident. Organize the case study into an easy-to-read format. It must be typed.

Level 5 Practice Problems

These practice problems resemble those found in the Work Keys Reading for Information assessment. Circle the correct answer for each item.

1. In the Bon Voyage! memo (p. 122 in Learning Activity 5.1), what does the term *CQ* mean?
   A. Crisis Quarters
   B. Crew's Quarters
   C. Cruise Quarters
   D. Crew Quarantine
   E. Cuisine Quantities

2. If Greg St. James's memo (p. 122 in Learning Activity 5.1) included the monthly schedule **only**, what would be the memo's main purpose?
   A. To teach new servers how to report for duty
   B. To help servers plan their months
   C. To give servers their cruise assignments for the month
   D. To give servers ideas for recreation during a cruise
   E. To teach new servers how to schedule their time

3. If Greg St. James's memo (p. 122 in Learning Activity 5.1) included the monthly schedule **only**, what would be the three details that *most support* the memo's main purpose?
   A. Dates, ships, cruise type
   B. Departure date, return date, type of cruise
   C. Dates, docks, type of cruise
   D. Dates, supervisor's name, ships
   E. Supervisor's name, date of memo, reporting dates

4. According to the narrative (p. 127 in Learning Activity 5.2), what is an acronym?
   A. Letters that represent a word or title
   B. An abbreviation
   C. An abbreviation for a set of words
   D. A word formed from the first letters of words found in a phrase or title
   E. An abbreviation used only in the workplace

5. A hazmat team handles:
   A. Chemical fires.
   B. Chemical burns.
   C. Chemical spills.
   D. Procedures to avoid inherently dangerous interactions of chemicals.
   E. All of the above.

6. You are working for a hat manufacturer. Your mentor, a dedicated and experienced employee, uses *bill* in the middle of a sentence while on the job. He is **most likely** referring to:
   A. The company CEO.
   B. His duck's mouth.
   C. The brim of the hat he is producing.
   D. The money in his wallet.

7. Another way to tell an office co-worker, *"You nailed it!"* is:
   A. You hit the nail with a hammer.
   B. You solved the problem.
   C. You found the answer.
   D. You are finally a success.
   E. Either B or C above.

8. An employee has a rash on her neck. If the In-House SOP Manual (p. 139 in Learning Activity 5.5) is your only guide, can you treat her?
   A. No
   B. Yes
   C. Only if I ask my supervisor
   D. No, but my supervisor can
   E. No, but the nurse can

Refer to the following narrative in answering questions nine 9–14.

> You are a groomer for a veterinary clinic. Your job duties cover dog care only—bathing, trimming hair and nails, cleaning anal glands, and styling coats on appropriate breeds. Cleaning anal glands and trimming nails can be messy jobs, so they aren't your favorites. You have worked in this job for three years and all of the staff members are very pleased with your work. They really trust you, as do most of the regular clients. You gain a great deal of job satisfaction from this fact. A regular client just dropped off Suzette, a white French Poodle, for her quarterly appointment. Suzette always gets "the works." She can be strong-willed, but she you are used to her temperament by now and have learned how to work around it.

9. Select the list that correctly orders the steps you must take to give Suzette "the works."
   A. Bathe, clean anal glands, style coat, trim nails
   B. Trim nails, bathe, clean anal glands, style coat
   C. Clean anal glands, style coat, bathe, trim nails
   D. Clean anal glands, trim nails, bathe, style coat
   E. Bathe, style coat, clean anal glands, trim nails

10. Which list correctly orders the steps you must take in giving a kitten "the works?"
    A. Bathe, clean anal glands, style coat, trim nails
    B. Trim nails, bathe, clean anal glands, style coat
    C. Clean anal glands, style coat, bathe, trim nails
    D. Clean anal glands, trim nails, bathe, style coat
    E. Bathe, style coat, clean anal glands, trim nails

11. As you begin Suzette's bath, you find a lump under her left shoulder. What should you do?
    A. Call the doctor
    B. Finish the bath, then call the doctor
    C. Go ahead and give Suzette "the works" before calling the doctor
    D. Call the doctor to examine Suzette, then confirm which procedures are appropriate to complete based on her diagnosis
    E. Call the doctor to examine Suzette and leave to work on the next "client."

12. What cause-effect situation exists in problem #11?
    A. The lump as it relates to the services requested
    B. My job security as it relates to the lump and the services requested
    C. The doctor's personality as it relates to mine
    D. The owner's personality as it relates to mine
    E. Suzette's temperament as relates to the services requested

13. Which of the following facts should be considered in deciding what action to take for Suzette's lump?
    A. The level of trust between the client and the doctor
    B. Suzette's owner being a regular
    C. Suzette's temperament
    D. Your three years of experience
    E. All facts except C

14. What **might** make having the doctor examine Suzette to determine the next steps the **best** alternative?
    A. Experience teaches
    B. Protecting my job
    C. Determining what is best for Suzette (unknown until the doctor diagnoses the lump)
    D. Determining what is best for Suzette's owner
    E. The cost to Suzette's owner

15. When is it best to drag?
    A. If you don't inhale
    B. If you aren't dragging something heavy
    C. If you are over 18 and take a drag from a cigarette
    D. Both A and B
    E. If your hand is attached to a computer mouse

Answers to Level 5 Practice Problems

	Answer	Skill Category	
1.	B	#2	
2.	C	#1	
3.	A	#1	
4.	D	#2	
5.	E	#2	
6.	C	#2	
7.	E	#2	
8.	A	#3 and #4	
9.	D	#3	
10.	E	#3	*(Hint: You don't do calls.)*
11.	D	#4	
12.	A	#3	
13.	E	#4	
14.	C	#3 and #4	
15.	E	#2	

Notes

Insert the "Improving to Level 6" Divider Here

Improving to Level 6

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Improving to Level 6

Skills

Level 6 learners can demonstrate the skills outlined in the highlighted portion of the Reading for Information Skill Set table on p. 151.

Leveling

Indicators of Level 6 learning activities are listed in the highlighted portion of the Leveling Overview table found on p. 152.

Reading for Infor

Level	Description		
		Identifying Main Ideas & Supporting Details	Unders M
Level 3	• Short, direct passage • Elementary vocabulary • Information clear & complete	Identify main idea & supporting details	• Recognize word(s) • Recognize not defined position, ti • Define wor (basic, not
Level 4	Level 3 skills plus: • Longer, more detailed & complex passage • Clear information; multiple factors to be considered • Elementary vocabulary that is slightly more difficult	Identify less obvious and/or embedded details; combine details	Use context t words not de
Level 5	Level 4 skills plus: • More detailed & complex passage • Covers broader topics	Same as Level 4, using more complex text	• Define tech acronyms, context; ap • Use contex words with
Level 6	Level 5 skills plus: • Significantly more difficult text • Advanced vocabulary • Information not clearly stated	Extract & synthesize important information to find implied details	• Use critica define tech that are us • Use contex common m meaning w
Level 7	Level 6 skills plus: • Difficult & dense text • Complex concepts • Difficult vocabulary	Same as Level 6, using more difficult & dense text like regulatory and legal documents	• Use context mon techni • Isolate mea ating among choosing m

mation Skill Set

Skill Categories		
tanding Word eanings	Applying Instructions	Applying Information & Reasoning
meaning of defined meaning of word(s) l that show order, me k-related words job-specific)	• Involves few and uncomplicated steps • Determine what to do and when	N/A
-find meanings of fined	• Involves several steps & complicated instructions; may include conditionals • Order steps, consider cause-effect relationships, & select correct action	Consider changing circumstances in making a decision for a described situation
nical terms, jargon, & from paraphrasing/ ply them correctly t to correctly define multiple meanings	Involves more steps &/or details; more variables; includes conditionals	Apply information to a similar, but undescribed situation
l thinking skills to nical terms & jargon ed out of context t to find the less eaning of multi-ord(s)	Same as Level 5, using more complicated text	• Apply complicated information to new situations • Determine general principles & rationale behind principles; generalize to related situations
to define uncom-cal terms & jargon nings by discrimin-g context clues, ost important	Same as Level 6, using denser, complicated text	Determine general principles & generalize to unrelated & undescribed situations

Leveling			
Level Indicators	**Level 3**	**Level 4**	
Length	Short	Somewhat longer	
Complexity			
• **Detail**	Limited to needed information	More detailed than Level 3	Si br
• **Clear/orderly**	All information clear; no reading between lines	Some details implied; no reading between lines	N m le
• **Sentences**	Simple, short	Some complex sentences	M co
• **Paragraphs**	Short	→	Lo
Vocabulary	Elementary; most words defined in text	Elementary, but more difficult; some undefined	Ja te
Instructions	Few steps; simple tasks	More steps; complicated instructions; may contain conditionals	M at
Application	N/A	Consider changing circumstances in making decisions	Ap si si
Typical documents	Announcement; short memorandum; simple schedule or instructions	Job procedure with several steps	H of

Overview

Level 5	Level 6	Level 7
→	→	Long
gnificantly more detailed; roader topics	More details; denser	More complex concepts
o reading between lines; ore complex; somewhat ss orderly	Some reading between lines; less logical order	More reading between lines
ixed (some simple, some mplex)	Complex, formal	Significantly longer, denser
nger, more complex	→	Significantly longer, denser
rgon/multiple meaning/ chnical words; defined	Advanced; jargon & technical terms; some undefined	Hard; legalese; unusual words
any steps &/or details; least 1 conditional	Multiple steps & conditionals; complicated instructions	→
pply information in text to milar, but undescribed tuation	Apply complicated guidelines to given & undescribed tasks; generalize to similar	Generalize to unrelated situations
ealth claims procedure; ffice equipment manual	Simple contract; some city codes	Complex legal document; corporate tax guide

Learning Activity 6.1—Unhappy Passenger

Materials

- Learning Activity 6.1 Learner Handout (pp. 157–160)
- Bay to Bay Cruise Lines Employee Manual, pages 9 and 10 (pp. 161–162)

Skills Addressed

If learners complete all of the assignments contained in this learning activity, they will practice each Level 6 skill and reinforce skills contained in Levels 3 through 5.

Prerequisite Skills and Activities

- Demonstrated competence in all Level 5 Reading for Information skills
- When moving from Level 5 to Level 6 skills, the text becomes significantly more complex and unfamiliar. In addition, learners must read between the lines to identify clues to the underlying meanings of both words and concepts, then make judgment calls. You can help learners make the jump to these Level 6 challenges by giving them opportunities to practice prerequisite skills like critical thinking before asking them to tackle Level 6 skills. (See the paragraphs titled "Help learners focus their thoughts," "Teach learners to read with a questioning mind," and "Have learners pause to reflect on what they are reading" in the Activities for Developing Prerequisite Reading Skills subsection, pp. 30–33, for more information.)

Instruction Methods

- Help learners practice foundational skills for Level 6 activities by introducing *Assignment #1* with a role play of the passenger complaint and having learners **take notes** about the specifics.
- For *Assignment #1*, have learners work in teams of 2–4 to synthesize the information. Then distribute the fax message addressed to Greg St. James (pp. 157–158) and instruct learners to swap their summaries and check them against the fax. Have them add any missing details to the papers they are checking, then return them. Allow plenty of time for learners to discuss *why* they suggested the changes. If time allows, ask some volunteers to present their summaries to the class; help learners *compare and contrast* their summaries. Facilitate a discussion that helps learners recognize that *different* is not necessarily better or worse.

- Learners could work in their Assignment #1 teams to complete *Assignment #2*, or practice ordering instructions individually.

Hint: This is an excellent opportunity to explain that many workplaces practice consensus-building. Consensus is not a democratic vote, rather employees listen to one another and negotiate until everyone "gets on board" (can agree).

- Arrange a debate situation for *Assignment #3*. Be sure the debate follows typical workplace circumstances—a team working together to solve problems (i.e., the debate may get heated, but learners **must** treat one another with respect and be open to others' perspectives). Explain that consensus must be reached by the end of the debate. After learners provide the factual answer, facilitate a discussion that helps them explain the thinking behind their answers. For example, in Learning Activity 4.1, Greg is introduced as a very fair manager. It is likely that he would advocate for his server as outlined in item E. You may wish to discuss how the company is likely to respond to Greg's recommendations. (If the company leaders follow their principles, they will agree with Greg.)

- You may wish to give *Assignment #4* for homework so that learners can take their time with the problem and with applying what they learned by completing the previous assignments. In addition, you can assess individual skill levels by evaluating each learner's response. Again, help learners examine the thinking behind their answers.

Answers

Assignment #1

Learners may synthesize the information in a variety of ways. Confirm that their method truly *synthesizes* the information rather than retells it (i.e., it should be more succinct, direct, and shorter than the original document). In addition, compare their papers to the sample narrative below to make sure they extracted all of the important details.

> A passenger, Mrs. Carlisle, lodged a complaint against a female server who provided cabin service to the Carlisles for the dinner meal. The server is accused of flirting with Mr. Carlisle—specifically verbally flirting (e.g., jokes about being spry at his age), touching his arm several times, and stroking and patting his cheek. She is said to have ignored Mrs. Carlisle most of the time she was in the cabin, although she spoke with Mrs. Carlisle when she entered. The incident went unreported during the cruise because the Carlisles fought over it, and Mrs. Carlisle did not want to bring it up again and further disrupt their anniversary cruise. Mr. Carlisle is not lodging a complaint; he doesn't know that Mrs. Carlisle called.

Assignment #2

Primary goal: investigate the complaint thoroughly

Steps:

1. Review details from passenger (Greta's fax)
2. Identify server
3. Interview her, using investigation techniques learned
4. Record interview (e.g., cassette tape)
5. Have tape transcribed
6. Review findings and write incident report (i.e., summary of incident and results of investigation; recommendations)
7. Forward incident report to Greta within 48 hours

Assignment #3

1. Driving principles are (a) to stay in business, the company must provide an outstanding quality of service to passengers and (b) the company is committed to investing in employee preparation (e.g., orientation, training) and mentoring (e.g., coaching, further training, second chances) to help workers meet the company's high service standards.

2. E [Be sure learners read between the lines to recognize that the female server could not have received the policy manual because she had been given no orientation or training, and because she had not received the assignment schedule memo. Help learners conclude further that had she received the manual, evidence indicates she would not have had a chance to review it (i.e., she had to get the details about reporting for her assignment from another new server).]

Assignment #4

1. C

2. B

For additional practice...

- Instruct learners to interview family members or friends about their customer complaint experiences and summarize them. Have them record the resolution on a separate sheet and put it in an envelope. Combine the stories, then pass them out for resolution. Have learners work in pairs or teams of 3–4 so they can *model* analysis skills and problem-solving tools for one another. Ask learners to compare the solutions they devised against what actually occurred. *(Hint: If time allows, help learners consider whether the actual solutions were the most productive and why.)*

- Help learners personalize the knowledge gained in the practice exercise by writing a journal entry or reflective essay about the two solutions (i.e., the actual solution and the one the team suggested). Since learners may find some situations in which their solutions are more appropriate than the actual solution, they should reflect on how **they** will behave differently in the workplace in an effort to improve it.

FAX Message

To: Greg St. James
DR Supervisor, Pacific Princess

2 PAGES TRANSMITTED

From: Greta Gibson
Vice President, Passenger Relations

Date: July 15, 2000

Greg, I am sorry that I was unable to reach you on the ship-to-shore lines before you sailed. I have a disturbing complaint from a passenger on your last cruise. My secretary has transcribed our tape-recorded telephone conversation for you.

Greta: *Yes, Mrs. Carlisle. May I help you?*

Mrs. C: *I certainly hope so! I can't believe how one of your servers acted.*

Greta: *I am so sorry to hear you are unhappy with one of our servers. Why don't you tell me what happened, Mrs. Carlisle, and which server offended you.*

Mrs. C: *Well, my husband and I had ordered service in our cabin for dinner. This cruise was our 50th wedding anniversary present to one another and we wanted a special evening. Your server, a woman—I don't remember her name but she had short black hair and glasses—came with a rolling table. She seemed really nice and friendly at first. Then, as we sat at the table and she was serving us, she started flirting shamelessly with my husband!*

Greta: *Could you describe the flirting for me Mrs. Carlisle. I'm taking notes on the specifics.*

Mrs. C: *Well, I don't know. She kept making jokes with him about still being spry at his age and kept touching him—his arm mostly, but once she ran her hand across his cheek and patted it.*

Greta: *Did she speak with you at all?*

Mrs. C: *Only when she arrived at our cabin. She pretty much ignored me the rest of the time.*

Greta: *Did you contact anyone onboard after this incident?*

Mrs. C: *No. My husband and I had a fight over it and I was so upset that I couldn't talk to anyone. When the bus boy came for our dishes, I was crying in the bathroom. And we arrived in port the next morning. My husband and I had made up and I didn't want to make waves by bringing up the subject again.*

Greta: *Is your husband lodging a compliant too, Mrs. Carlisle?*

Mrs. C: *No. He doesn't even know I'm calling you.*

Greta: *Is there anything else you'd like me to know about this incident?*

Mrs. C: *No. I think that's it. What are you going to do about this?*

Greta: *Well, Mrs. Carlisle, we want all of our passengers to feel at home on our cruises. I am very sorry that this server upset you. My next step is to investigate the situation further with the server and her supervisor. We have company policies concerning such situations and will use them to handle this matter.*

Mrs. C: *Will you call me back and tell me what happens?*

Greta: *I'm sorry, Mrs. Carlisle. I must keep our employee matters confidential. But please know that we take complaints like yours extremely seriously. I can tell you that we will spend several hours researching this situation and determining the most appropriate consequences. You can rest assured that the consequences will be driven by our primary mission—to make our customers feel like royalty.*

Mrs. C: *Well, I'd still like to know what happens. How do I know you won't just forget about me when you hang up the phone?*

Greta: *You have the reputation of our cruise lines and my personal word, Mrs. Carlisle. We are sincere in our desire to serve our passengers. While I cannot give you any information about the outcome of our investigation as it relates to our employee, I will contact you in a few days to let you know how the company plans to compensate you for your difficult experience. Our Board of Directors will want to review your situation and customize a solution especially for you and Mr. Carlisle.*

Mrs. C: *Oh, that's not necessary. It's over. I just want that server to learn from her mistake or be removed from her position so that someone else doesn't have to suffer what I went through.*

Greta: *We want to fix any problems too. Part of fixing our mistakes is to provide restitution to you and your husband. That's just the way we prefer to handle things here at Bay to Bay Cruise Lines. So I'll call you in a few days, alright?*

Mrs. C: *Well, I guess so. Thank you very much, Mrs. Gibson.*

Greta: *You are quite welcome. And, again, I am so sorry for the trouble you experienced on your cruise.*

Greg, will you follow our usual procedures for investigating this matter? I need a report in 48 hours.

Assignment #1

There is a lot of information in this fax message. Extract and synthesize the important and relevant details for Greg.

Assignment #2

Using the employee manual pages and the fax, list **every** step Greg should take in responding to Greta's request—in order of completion. Start by identifying his primary goal in performing this task.

Assignment #3

1. Name the two most important underlying principles behind the Bay to Bay Passenger Service policy. To help you, consider these two questions:

    - In 1–3 words, what do you think was on the minds of the people who wrote the Passenger Service Policy?

    - What drove them to write it, and to choose the guidelines and consequences listed?

2. Assume the investigation followed SOPs and found that the server in question was the young lady who joined the team just prior to sailing (she had not received the orientation, training, or schedule memo). Which of the following recommendations do you think Greg would make?
    A. Greg would recommend that the server apologize in writing to the passenger **and** receive additional training and/or mentoring.
    B. Greg would recommend that the server apologize in writing and suspend her without pay from her next cruise.
    C. Greg would recommend that the server apologize in writing and receive both training and a new ship assignment.
    D. Greg would recommend that the server apologize in writing and be demoted to dishwasher.
    E. Greg would recommend that **he** write the apology, explaining and taking the responsibility for her lack of training. He would coach her about the difference between friendly and flirting behaviors, while encouraging her to count the incident as valuable OJT. In addition, he would keep her in serving situations that allowed close monitoring until she receives her orientation and training. Finally, he would mark the incident report "company error—employee untrained" before putting it in her file.

Assignment #4

A Bay to Bay Captain received the following passenger complaint:

> ***A young female passenger who took the cruise alone called the company after debarking to complain that Greg St. James propositioned her midway through the cruise. The details provided by the head office are somewhat vague and their memo explains that this is due to the passenger's vague responses. For example, she cannot say which day the incident occurred nor can she remember exactly where.***

Greg has worked with Bay to Bay for 10 years. There are zero prior complaints of any nature, either from passengers or fellow employees. Use your findings in Assignment #4 and the employee manual pages to decide which action plan and solution are the best choices for the Captain to make?

1. Action plan options:
   A. Interview Greg on tape (SOP) and write an incident report.
   B. Show Greg the fax from the Passenger Service Department, interview him, ask him to put his version of the story in writing, and write an incident report.
   C. Follow SOPs precisely—have Greg's direct supervisor interview him, record it, gather insights from other employees, provide his/her own comments, and make recommendations. Interview the passenger again to show her you are taking her complaint seriously and to attempt to get more details. Do **not** show Greg the fax. Make your ruling and inform the Passenger Service Department.
   D. Follow SOPs precisely, including getting comments from other employees and recording your interview with Greg. Interview the passenger again to show her you are taking her complaint seriously and to attempt to get more details. Show Greg the fax after recording his side of the story. Make your ruling and inform the Passenger Service Department.
   E. Interview Greg on tape, interview the passenger again, talk to Greg's supervisor and fellow employees, make your ruling, and inform the board.

2. Solution options (assume the investigation shows Greg is innocent):
   A. Tell Greg not to worry about it and throw the materials in the trash.
   B. Summarize your findings in a report. Recommend that the company attorney draft a short apology for Greg to sign that does not admit any guilt. Have it sent with the board's restitution so there is no direct contact. Recommend a pair of tickets to the theater for restitution (i.e., non-condescending and avoids shipboard contact).
   C. Have Greg write an apology that does not admit guilt. Summarize your findings and send them, along with the note from Greg, to the board.
   D. Call the customer and tell her to get counseling.
   E. Summarize your findings in a report. Have Greg write an apology that does not admit guilt. Deliver the report, apology, and a ticket for your next cruise to the passenger.

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Passenger Service

As you should have learned during orientation and your job training, customer service is our #1 priority. **We want people to feel like royalty when they sail with us.** Why? Because we are in the people business. Our company will capsize without our passengers.

We expect you to perform your duties with the utmost of professional courtesy and "good cheer." Here are some guidelines:

- Your uniform should be impeccably groomed and pressed at all times.
- Be generous with your smiles.
- Speak respectfully and professionally at all times.
- Convey a friendly demeanor (i.e., *professional* does not mean *stiff*).
- Never speak crossly with a passenger, even if he/she is inappropriate. (Simply excuse yourself politely and let your supervisor handle the problem.)
- While it is important to be friendly, be sure that you never cross the line into flirtatious behavior. **Under no circumstances are you to ever become romantically or intimately involved with a passenger during a cruise.**
- Follow all of the specific passenger service guidelines provided during your training.

Because excellent passenger service is the mainstay of our business, there are serious consequences for poor passenger service. The passenger complaint process was explained in your training. (You should have signed a document stating that you attended the training and understood its contents.) To summarize, all complaints will be investigated thoroughly. Details will be obtained from the passenger and the accused. They will be recorded both verbally and in writing. A direct supervisor handles the investigation; supervisors have been trained by professional detectives to ensure the most accurate evidence. The supervisor summarizes the complaint and investigation results on an incident report form. His or her recommendations for resolving the matter are included too. Passengers are almost always given some form of restitution; the type of award is decided on a case-by-case basis.

Employees who do not adhere to the Passenger Service Policy face the following consequences:

- The employee must apologize in person or in writing to the passenger **and** receive additional training and/or mentoring.
- The employee must apologize in person or in writing and will be suspended without pay from his/her next cruise.
- The employee must apologize in person or in writing and will receive both training and a new ship assignment.

- The employee must apologize in writing and will be demoted to the next lower position. If demotion is not possible, the employee could be terminated.
- The employee is terminated.

The Captain is briefed concerning all incidents and makes the decision concerning the appropriate consequences for each infraction. He/she considers type of offense, length of service, damage to the company, prior offenses, extenuating circumstances, comments from the direct supervisor and two fellow workers, worker's response to the allegations, and similar factors.

It is this company's desire to help all employees achieve success in their jobs. We will provide training, coaching, counseling, or other support services to help a worker develop the skills required for treating passengers like royalty. However, we will not hesitate to terminate employment, if necessary.

Learning Activity 6.2—About Accidents

Materials

- Learning Activity 6.2 Learner Handout (p. 165)
- Accident Report form (optional)

Skills Addressed

- Category #1: **Extracting and synthesizing important information; identifying implied details**
- Category #4: Determining rationale behind principles and generalizing to related situations.

Prerequisite Skills and Activities

- Demonstrated competence in all Level 5 Reading for Information skills
- Familiarity with the 5Ws tool

Instruction Methods

- *Assignment #1* is designed to allow learners to create their own report forms. Alternatively, you may wish to obtain standard accident report forms from local businesses or professional associations for learners to use in completing the exercise.
- Organize learners into teams of 3–4 for completing *Assignment #2*. Pick enough supervisors to divide the class into three-member teams. Let the supervisors choose their two employees for the project. Give learners very broad criteria for the end product (i.e., safety policy and form) like: the product and form should be appropriate for a small, service-oriented company. *(Hint: This accounting firm doesn't need a 20-page safety manual like those used by heavy manufacturing operations.)* Provide limited or no instruction concerning how to complete the assignment so that learners must face a challenge similar to those they will find in the workplace. But give hints if learners get stuck during the process.

Hint: To get the most learning from this exercise, do not grade learners' products; they will feel freer to learn by exploration.

Answers

Assignment #1

Sample accident report:

Accident Report

Who: Joe Smith
What: Minor cut
When: [Today's date]
Where: Kitchen (at shredder)
Why: Operator error (fed too much paper, jammed, tried to clear) and lack of training

Recommendations

For liability reasons, I believe we should establish a written safety policy **immediately**. It should include a standard safety incident report form so that the company maintains clear, consistent reports.

Assignment #2

Learners' safety policies will probably differ. Be sure they followed the criteria you provided and encourage their creativity. Provide additional suggestions for further work and let them use your feedback to improve their products. Depending upon the overall skill levels of your learners, it is likely that most teams will need to improve their products. **Important!** Help them recognize that this process is highly typical of producing documents (e.g., policies, procedures, letters, articles, business plans, architectural designs) in the work world—workers/topic experts provide drafts, managers suggest improvements, and workers use that input to create the final product.

For additional practice...

Write some small-injury (e.g., sprains, cuts, abrasions) case studies and put one of the accident report forms collected in Assignment #2 with each case. Distribute one case every few weeks, having learners complete the form. Explain that this ongoing exercise mirrors the workplace because the cases are typical of some workplace settings such as road construction and trash hauling, and supervisors in these fields often handle an accident and file a report every few weeks.

Learning Activity 6.2—About Accidents

Learner Handout

Accident Case Study

You are a supervisor for a small accounting firm that opened just three months ago. One of the bookkeepers, Joe Smith, caught his finger in the shredding machine. You and he stopped the bleeding in a few minutes, but you sent him to his family doctor just to be safe. Since your company is so new, you have no safety policy or accident report forms.

Assignment #1

Using the 5Ws, write an accident report that includes all of the important facts about the incident. After presenting the facts, write your recommendations for future accident situations.

Assignment #2

The boss likes your recommendations. She wants you to pick two other employees and work together as a team to implement them.

Materials

- Learning Activity 6.3 Learner Handout (pp. 168–169)

Skills Addressed

- Category #2: **Using critical thinking skills to define uncommon technical terms and jargon**
- Category #2: **Using context to find the less common meaning of multiple-meaning words**
- Category #1: Extracting important information to identify implied details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 5 Reading for Information skills
- Learners should be given practice in reading between the lines and defining words through context before attempting this learning activity.

Instruction Methods

- Organize learners into teams of 2–3 to complete *Assignment #1*. Create a set of class lists (one for each category). Help learners negotiate about which words/phrases belong in which category, if necessary, focusing them on the reasoning behind their choices.
- Have learners use the class lists from Assignment #1 to complete *Assignment #2* individually; more practice quizzes will be created if they complete this assignment separately (see *For additional practice...* section).

Answers

Assignment #1

Technical	Jargon	Multi-Meanings
Ford Econoline vans	Work coming out of our ears	Geared
Battery	Shop	Regular maintenance
Alternator	On-site	Emergency
Electrical system diagnostics	Fleet	Ran
Test A	Delivery guys	Short
	Ear's half missing	Safe side
	Blowing smoke	
	Update	

Assignment #2

Check quizzes and answer sheets for accuracy, clarity, and completeness (e.g., all words/phrases on the class lists are included). Definitions for the multiple-meaning words (as used in Jake's message) are listed:

- Geared: Ready to work
- Regular maintenance: Oil change; fluids, tires, general items checked. Note: Regular maintenance means *cleaning* in some industries.
- Emergency: Quick turnaround needed
- Ran: Started/operated
- Short: Wire that is not making the electrical connection
- Safe side: Save time

For additional practice...

Check the quizzes and answer sheets that learners completed for Assignment #2 for accuracy and clarity. Let learners edit the quizzes, if needed. Number the final products (i.e., Quiz #1, Answer Sheet #1, Quiz #2, Answer Sheet #2). Place the answer sheets in a notebook or folder that learners can access easily. Distribute a quiz every day or two. Let learners complete them individually, then check their work against the answer sheets and make any necessary corrections. Completed quizzes can be used for assessment purposes.

Learner Handout

From: Jake1@auto.com
To: Mike2@auto.com
Subject: On-site job
X-Status: New

Hi Mike:

Welcome back from vacation. I hope you're geared up because we've got work coming out of our ears--16 Ford Econoline vans in the shop (what's up with these things!) and 4 on-site jobs. And that's just for Monday. We've got regular maintenance jobs on the City's fleet Tuesday through Thursday this week too. And who knows what emergency jobs will come in.

BUT FIRST, I've got an on-site job for you. You need to get over there first thing today. Joe over at Bill's Parts has a truck that won't start. His 2 delivery guys are trying to do all the deliveries with one truck, swapping it. What a mess! And you know Joe. My ear's half missing already.

He says the truck simply wouldn't start when they got there Friday morning, but it ran fine the day before. I'd check with the driver to be sure. It may be a short, battery, alternator, or something else. Take all your electrical system diagnostics to be on the safe side.

Try running Test A from the Ford manual. We got an update last month and the salesman says the engineers have outdone themselves on the new testing procedures. Let me know if you agree or if the salesman is blowing smoke.

Well, get on over there, buddy!

Jake

Assignment #1

1. List each technical word/phrase found in Jake's message.
2. List all of the jargon (words and/or phrases) found in Jake's message.
3. List every word that could have multiple meanings found in Jake's message.

Assignment #2

Using every word on your list, write a multiple-choice quiz. Remember to create an answer sheet for your quiz.

Materials

- Learning Activity 6.4 Learner Handout (pp. 173–174)

Skills Addressed

- Category #3: **Using complicated instructions to decide appropriate action**
- Category #2: Using critical thinking skills to define uncommon technical terms and jargon
- Category #2: Using context to find the less common meaning of multiple-meaning words

Prerequisite Skills and Activities

- Demonstrated competence in all Level 5 Reading for Information skills
- Give learners practice with complicated instructions before introducing this learning activity.

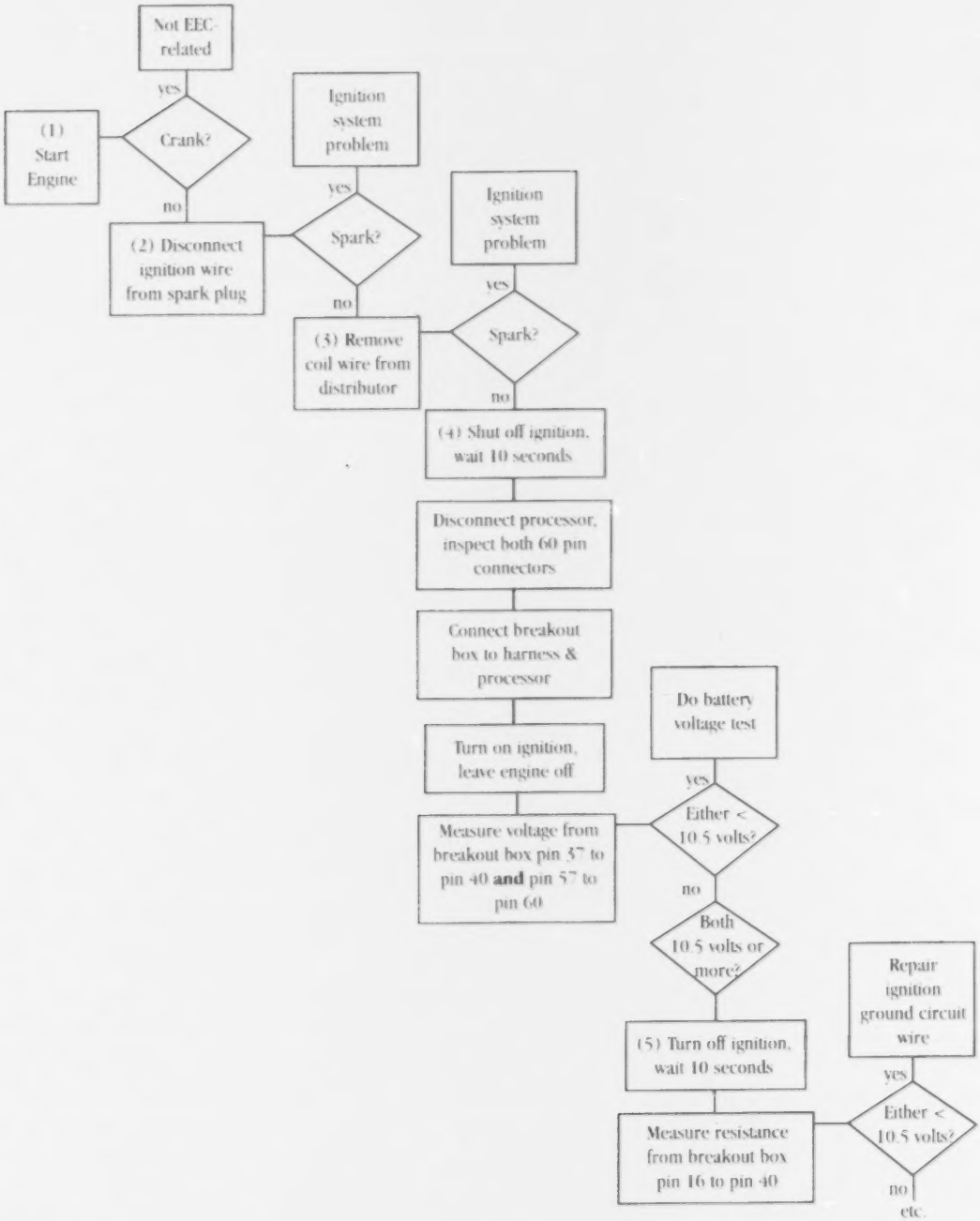
Instruction Methods

- Organize learners into teams of 3–4 to complete *Assignment #1* so they can benefit from the experience (e.g., mechanical knowledge) and talents (e.g., drawing skills) of other learners. Encourage them to make sure each team member contributes; monitor and facilitate, as needed.
- Have learners write the problem and the repair steps for *Assignment #2* individually, then facilitate a class discussion that results in a combined list. Be sure to ask whether learners used their flowcharts to complete this assignment and how they affected the process.

Answers

Assignment #1

Learners' flowcharts may vary. Be sure they follow the instructions (i.e., boxes and triangles), that all steps are included in the correct order, and the charts are user-friendly. A sample flowchart for steps 1–5 follows:



Assignment #2

Problem: A short in circuit 324

1. Fix the short
2. Retest

For additional practice...

Provide additional problem scenarios for Test A like the one used in Assignment #2. Have learners practice using the manual and/or their flow charts to determine the correct solution from complicated instructions.

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Learning Activity 6.4—Manual Translation

Learner Handout

Assignment #1

You are a high school trainee working with Mike through a worksite mentoring program. Because your first day with him was last Friday and he was on vacation, he told you during orientation to use Friday to review the light trucks manual and be ready to conduct Test A when he returns. You find Test A pretty confusing to follow in narrative form, so you decide to do a *manual translation*. Create a flow chart to follow when conducting Test A, placing each decision point in a triangle and other steps in separate boxes.

Assignment #2

Mike just handed you part of an e-mail message (illustrated below); read it. He asked you to conduct the test. You have completed the first eight steps. In completing Step 9, you find that resistance is less than 10,000 ohms. Use the manual instructions to determine what the problem is and how to fix it. List the problems and the steps you would take to complete the repair.

BUT FIRST, I've got an on-site job for you. You need to get over there first thing today. Joe over at Bill's Parts has a truck that won't start. His 2 delivery guys are trying to do all the deliveries with one truck, swapping it. What a mess! And you know Joe. My ear's half missing already.

He says the truck simply wouldn't start when they got there Friday morning, but it ran fine the day before. I'd check with the driver to be sure. It may be a short, battery, alternator, or something else. Take all your electrical system diagnostics to be on the safe side.

Try running Test A from the Ford manual. We got an update last month and the salesman says the engineers have outdone themselves on the new testing procedures. Let me know if you agree or if the salesman is blowing smoke.

Well, get on over there, buddy!

Jake

FORD TRUCK/VAN TEST A

NO START TEST

1) Try to start engine. If engine does not crank, problem is not EEC related. If engine cranks but does not start or stalls out, proceed with Test A.

2) Disconnect an ignition wire from spark plug and check for spark. If spark is present, problem is in ignition system. If spark is not present, proceed with Test A.

3) Remove coil wire from distributor and check for spark. If spark is present, problem is in ignition system. If spark is not present, proceed with Test A.

4) Shut off ignition and wait 10 seconds. Disconnect processor and inspect both 60 pin connectors. Connect breakout box to harness and processor. Turn ignition on, engine off. Measure voltage from breakout box pin 37 to pin 40 and breakout box pin 57 to pin 60. If either reading is less than 10.5 volts, perform Battery Voltage Test. If both readings are 10.5 volts or more, proceed with Test A.

5) Turn ignition off and wait 10 seconds. Measure resistance from breakout box pin 16 to pin 40. If resistance is 5 ohms or more, repair ignition ground circuit wire. If resistance is 5 ohms or less, proceed with Test A.

6) Connect voltmeter positive lead to breakout box pin 56 and negative lead to pin 16. Observe voltage while cranking. If voltage is between 3 and 6 volts, proceed to step 9). If voltage is less than 3 volts or more than 6 volts, proceed to step 7).

7) Shut off ignition and wait 10 seconds. Measure continuity from breakout box pin 56 to harness circuit 349 at TFI connector. If resistance is more than 5 ohms, repair open in circuit 349 and retest. If resistance is 5 ohms or less, proceed with Test A.

8) Shut off ignition and wait 10 seconds. Disconnect TFI connector and processor. Measure resistance from breakout box pin 56 to breakout box pins 26, 40, 46 and 57. If any resistance is less than 10,000 ohms, repair short in circuit 349 and retest. If all resistances are more than 10,000 ohms, proceed with Test A.

9) Shut off ignition and wait 10 seconds. Disconnect TFI connector and processor. Measure resistance from breakout box pin36 to breakout box pins 26, 40, 46 and 57. If any resistance is less than 10,000 ohms, repair short in circuit 324 and retest. If all resistances are more than 10,000 ohms proceed w th Test A.

10) Reconnect TFI connector and leave processor disconnected. Try to start engine. If engine starts, replace processor and retest. If engine does not start, problem is not EEC related.

Adapted from *Mitchell Manual for Repairing Light Trucks* (1993).

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Learning Activity 6.5—Drugs and the Workplace

Materials

- Learning Activity 6.5 Learner Handout (pp. 177–178)

Skills Addressed

- Category #4: **Determining underlying principles and the rationale behind them, and generalizing to related situations**
- Category #1: Extracting and synthesizing important information; identifying implied details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 5 Reading for Information skills
- Give learners practice in using critical thinking skills.
- Give learners opportunities to practice reading between the lines and using judgment.

Instruction Methods

- Have learners work in teams of 3–4 to complete *Assignment #1* so they can draw upon different viewpoints and practice consensus-building skills.
- Have learners complete *Assignments #2* and *#3* independently so that you can assess individual skills. Provide additional practice for those who struggle with these assignments.
- Instruct learners to compare their answers to *Assignment #3* to those of their classmates'. It is likely that some learners will answer "yes" and some will answer "no." Let learners debate the answers in teams of 2–3. Most, if not all, learners will soon recognize that "no" is the correct answer. Facilitate a class discussion that helps them process how easy it was to miss the key phrase (i.e., committed at the workplace) and identify ways to avoid such errors in the future.

Answers

Assignment #1

Allied's desire to comply with federal drug policies in order to protect their contracts with federal agencies

Assignment #2

1. E
2. E
3. C

Assignment #3

No, because the second paragraph says, "committed at the workplace." Joseph was arrested at a co-worker's apartment.

For additional practice...

Have learners create additional case studies. They can seek real experiences from friends, relatives, and co-workers (changing the names and circumstances to protect confidentiality); find news stories about drug arrests; or create fictional cases. Distribute the cases and let learners use the Allied policy to practice generalizing to related situations. To expand the practice, provide drug policies from other companies for use with learners' cases.

Learner Handout

Allied Technologies
Drug Policy

Page 2 of 2

Workers should be aware that using a controlled substance during off-work hours may affect performance on the job. Therefore, drug usage during off-work time may subject a worker to disciplinary procedures up to and including termination. In addition, use of any controlled substance in the workplace and/or during work hours will not be tolerated. Any worker found to be using a controlled substance in the workplace and/or during work hours will be subject to immediate termination.

Any worker performing duties for a federal contract, or at a government facility where such work is being performed must notify his/her manager of any criminal drug statute conviction for a drug-related offense committed at the workplace within five (5) days after the conviction. Failure to report said conviction within the required period will result in immediate termination. Allied will report the conviction to the appropriate federal agency.

If job performance or behavior indicates drug abuse (abuse of a substance controlled by any law), Allied will immediately initiate a drug test, as required by the Department of Defense and by Allied. Such drug test is mandatory for **all** workers. Refusal to submit to a drug test in such situations is cause for disciplinary action, up to and including termination.

Disciplinary actions include temporary suspension, probation, or termination. Participation in a treatment plan may be required. Non-completion of a mandatory rehabilitation program will result in termination. If a worker violates Allied's drug policy more than once, that worker will be terminated immediately.

Assignment #1

Read page 2 of the Allied Drug Policy carefully, then name the underlying reason that drives the Allied Technologies policy.

Assignment #2

Joseph Jenkins works for Allied. He is performing services at a federal office building. He has been partying with some clerks most nights. Being unaccustomed to daily partying, Joseph comes to work groggy and gets little work done in the morning. However, he feels that he makes up for it in the afternoon. The client called Allied HR to request a drug test. Using the Allied Drug Policy, determine the **best** responses to the following questions about the Joseph Jenkins case.

1. Joseph is not required to submit to the drug test because
   A. He didn't use any controlled substances.
   B. He was not caught using controlled substances on the job.
   C. He catches up his work in the afternoon.
   D. What he does during his off hours is his business.
   E. None of the above; Joseph will be fired if he does not submit to the drug test.

2. If Joseph's drug test comes back positive, what disciplinary action does he face?
   A. Temporary suspension
   B. Probation
   C. Termination
   D. Mandatory participation in a drug treatment plan
   E. Any of the above

3. Considering the driving reason behind Allied's Drug Policy, what is the minimum action HR is likely to take if the test comes back positive?
   A. Temporary suspension
   B. Probation
   C. Remove Joseph from the job, replacing him with a senior worker with a proven track record (both on and off the job)
   D. Termination
   E. Mandatory participation in a drug treatment plan

Assignment #3

Joseph's drug test was clean (negative). However, three days **before** he was tested, Joseph was arrested for possession of marijuana at a co-worker's apartment. His trial was today (Monday) and he was convicted. He was fined $300 and must do 20 hours of community service. He will be on probation for one year. Does Joseph have to report his conviction? If no, why not? If yes, why? To whom? By when?

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Learning Activity 6.6—Workplace Changes

Materials

- Learning Activity 6.6 Learner Handout (pp. 181–182)
- *AXIS Newsletter* article (p. 183)

Skills Addressed

- Category #4: **Applying complicated information to new situations**
- Category #1: Extracting and synthesizing important information; identifying implied details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 5 Reading for Information skills
- Give learners practice in using critical thinking skills and in reading between the lines and using judgment.
- Learners should be given opportunities to develop planning skills before attempting this activity.

Instruction Methods

- Organize learners into teams of 3–4 to complete *Assignments #1* and *#2* so they can draw upon different viewpoints and practice consensus-building skills.
- You may wish to have learners remain in the same teams used in the two previous assignments to complete *Assignment #3* because they will be familiar with one another already—especially helpful since this is a challenging activity. Some guidance will be needed for learners to complete this exercise. You can provide a sample business plan, model the creation of a plan, give learners specific criteria for creating the plan, provide several business planning resources, or let learners conduct research and find their own resources/samples. Customize the guidance to your learners' needs.

Answers

Assignment #1

E. **Important!** Help learners recognize that B and D address the same concept—research—and that the HR manager must do research (i.e., homework) in order to meet goals A and C. Thus, B and D are objectives under the larger goals in A and C.

Assignment #2

D

Assignment #3

Check plans for thoroughness, completeness, and attention to the goals (i.e., changing words and attitudes).

For additional practice...

- Instruct learners to **apply** one or more of the plans for using the *AXIS* article. For example, let a team give classmates a training session. You may wish to have learners polish the training session and invite local businesses to participate in the training (delivered by your learners).

- Have learners create a business plan for implementing this workplace change (see Assignment #2, Item D). It should include the smaller plan created in Assignment #3. The business plan should address research, preparation (e.g., mental, physical, psychological), implementation, assessment, and monitoring functions.

A Workplace Conversation:

CEO: (Closing the door) *We need to make a hiring change.*

HR Manager: *What kind of change?*

CEO: *We need to interview and hire people from the disabled population.*

HR Manager: *Why?*

CEO: *Because we need additional sources for workers—the low unemployment rate is killing us. And because Marsha Adams in Accounting pitched the idea and sold me on it last night.*

HR Manager: *Well, we sure need more workers and my recruiting efforts have failed to locate applicants with good work ethics. I've heard some disabled people are fabulous workers. I'm not against the idea, boss, but I am concerned that we might be opening a can of worms—legally speaking.*

CEO: *I understand your concerns. I already checked things out with our attorney. Why don't you go speak with Marsha to get the full picture on this opportunity, then see our attorney. Do any other research you think is appropriate, but get back to me by the end of the week. We're going to do this, but I want to do it right—and that's your job. So go do your homework and let me know what you need to make this happen.*

Assignment #1

You are the HR manager. Marsha gives you the big picture, including an article about shedding labels (see attached article). The company attorney reassured you by providing facts about hiring the disabled (e.g., you are not required to hire anyone who is not qualified for the job) and promising to work closely with you as you take the company into this uncharted territory. Before you can tell the boss what you need, you need to identify the **major** goals required concerning bringing people with disabilities into your workplace. What are they?

A. Finding and hiring qualified people with disabilities
B. Learning more about this population
C. Preparing current employees to welcome and work with people with disabilities
D. Visiting companies that already hire people with disabilities and collecting their policies and procedures
E. Both A and C above

Assignment #2

Review the *AXIS Newsletter* article. How can you use it to address your major goals?

A. I can educate workers and myself about respectful treatment of people with disabilities, with the goal of changing both our words and our attitudes.
B. I can educate myself about respectful treatment of people with disabilities, with the goal of changing my words so I avoid legal problems.
C. I can educate all current employees about respectful treatment of people with disabilities, with the goal of avoiding legal problems.
D. I can use it as one piece of a larger training plan I will need to conduct in order to prepare both current workers and myself for this hiring change.
E. The article does not apply to my goals.

Assignment #3

Create a business plan that outlines how you will use the *AXIS Newsletter* article to educate workers and yourself about respectful treatment of people with disabilities, with the goal of changing everyone's words and attitudes.

Public Awareness

National organization reminds reporters to shed labels

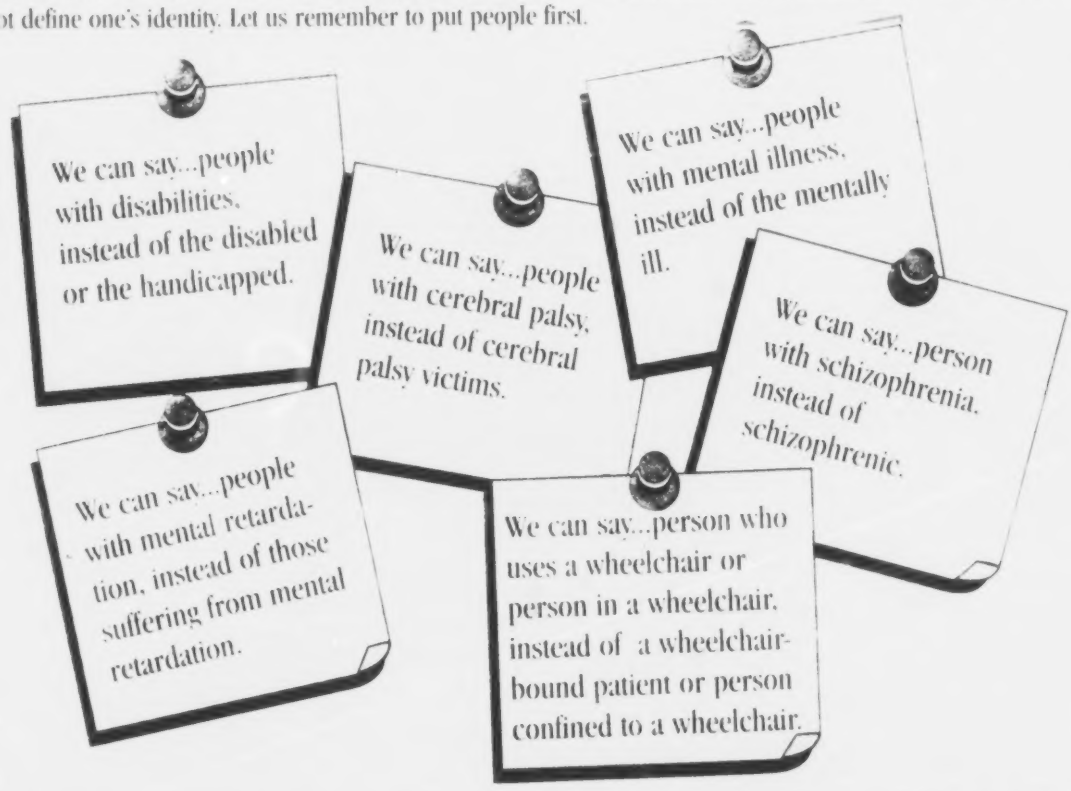
–Mark S. Quigley, National Council on Disability (NCD)

NCD is providing this advice for reporters:

For centuries, people with disabilities have been subjected to stereotyping and dehumanization through the language used to describe them. Although some progress has been made in this century to shed labels such as crippled and feebleminded, unfortunately, it is still the case that people who happen to have a disability are seen as disabled first and as a person second.

It is this type of stereotyping that reinforces the continued isolation, segregation, and stigmatization of people with disabilities, even nine years after the passage of ADA (Americans with Disabilities Act).

It should be remembered that in enacting ADA, Congress consciously chose to refer to people with disabilities as Americans first. In a country in which there is an Americans with Disabilities Act, disability need not define one's identity. Let us remember to put people first.


We can say...people with disabilities, instead of the disabled or the handicapped.
We can say...people with cerebral palsy, instead of cerebral palsy victims.
We can say...people with mental illness, instead of the mentally ill.
We can say...person with schizophrenia, instead of schizophrenic.
We can say...people with mental retardation, instead of those suffering from mental retardation.
We can say...person who uses a wheelchair or person in a wheelchair, instead of a wheelchair-bound patient or person confined to a wheelchair.

When we begin to use language in a manner that truly respects people first, our language will help move us toward fulfilling the promises of the Americans with Disabilities Act.

NCD is an independent federal agency currently coordinating a multi-year study on the enforcement and implementation of ADA and other civil rights laws. Visit NCD's award-winning website: http://www.ncd.gov for more information.

AXIS encourages its readers to copy this article and share it with local reporters of major metropolitan newspapers, or small neighborhood papers. Remind editors also to use this form of language when writing headlines.

AXIS Newsletter, Summer 1999. Used with permission.

Level 6 Practice Problems

These practice problems resemble those found in the Work Keys Reading for Information assessment. Circle the correct answer for each item.

Use the Bay to Bay Cruise Lines Employee Manual, pp. 161–162, to answer questions 1–4.

1. According to the manual, poor customer service will cause:
   A. All the ships to capsize.
   B. The company to go out of business.
   C. Irritable passengers.
   D. Irritable crew members.
   E. Cancellation of the cruise.

2. During a cruise, employees must be friendly with passengers but they cannot:
   A. Flirt with a passenger.
   B. Ask a passenger for a date.
   C. Kiss a passenger.
   D. Begin a relationship with a passenger.
   E. Take any of the above actions.

3. The word *capsize* as used in the last line of the first paragraph means:
   A. A ship turning upside down.
   B. Bankruptcy.
   C. A company takeover.
   D. Bay to Bay will no longer exist in its present form.
   E. Loss of customers.

4. The words *romantically* or *intimately* as used in the guidelines list (second to last bullet) refer to:
   A. Any behavior that is **not** platonic.
   B. Sexual behaviors.
   C. Dating passengers.
   D. Asking for a passenger's cabin number.
   E. Any behavior that is **not** platonic, except harmless flirting.

5. In the Ford Truck Van Test A found in Learning Activity 6.4 , what does the word *open* in paragraph 7 refer to?
   A. A door
   B. A space in an electrical current
   C. An electrical test
   D. A step in an electrical test
   E. A resistance

6. According to the same Test A, how long do you need to wait after turning off the ignition?
   A. Until you see 10.5 volts
   B. Ten minutes
   C. Ten seconds
   D. Overnight
   E. Until you see 5 ohms

7. According to Test A, if you measure the resistance from breakout box pin 16 to pin 40 and find 5 ohms or more, you need to
   A. Proceed with the test.
   B. Repair an open in circuit 349.
   C. Repair a short in circuit 349.
   D. Perform a Voltage Battery Test.
   E. Repair an ignition ground circuit wire.

Use the job posting on p. 187 to answer questions 8–10.

8. Generally speaking, the company depends on an Aftermarket Sales Administrator to:
   A. Maintain strong relationships between the company and its customers.
   B. Call dealers.
   C. Expedite orders.
   D. Communicate information to company personnel.
   E. Travel to dealers' workplaces.

9. Why is the Aftermarket Sales Administrator important to the company's long-term success?
   A. Because he/she enforces company policies with the dealers
   B. Because he/she services customers directly
   C. Because he/she supports the company's dealers, which helps keep them satisfied and selling the company's products (and thereby helps keep customers satisfied and buying)
   D. Because he/she networks with customers, dealers, and company personnel
   E. Because he/she visits dealers at *their* stores

10. This Aftermarket Sales Administrator position is with a company that sells expensive heavy equipment. What other businesses probably hire employees for similar positions?
   A. Fast food restaurants
   B. Discount retail stores
   C. Swimming pools
   D. Luxury car dealers
   E. Toy stores

11. In Activity 6.4, why is the title *Manual Translation* an appropriate title?
    A. Because learners had to *translate* the manual to make it easier to follow
    B. Because the activity deals with trucks
    C. Because learners had to *translate* the manual transmission
    D. Because most trucks have a manual transmission
    E. None of the above—the title was inappropriate

JOB POSTING

DATE OF NOTICE POSTING: **21 March 2000**
LAST DATE TO APPLY: **26 March 2000**

JOB TITLE:
AFTERMARKET SALES ADMINISTRATOR (GRADE 4)

JOB DUTIES:

1. Contact source for dealers and company personnel by phone or correspondence to secure information on various aftermarket incentive and promotional programs for parts, service, and availability.
2. Expedites critical dealer orders through contact with designated Product Managers and Suppliers, reviews parts status reports and coordinates Branch truckload programs, orders.
3. Coordinates resolution of parts problems between the Branch, Parts Distribution Center, factories, HQ, vendors, and dealers.
4. Provides Telemarketing services to dealers and branch personnel to promote ordering programs and secure orders.
5. Maintains records and files for the department and prepares program status reports. Assist Aftermarket Specialists in preparing training material for Aftermarket Meetings.
6. Coordinates the distribution of bulletins company personnel on all aftermarket programs and corresponds with dealers, suppliers and company personnel to clarify issues.

GENERAL REQUIREMENTS:

Understanding of Dealer and Branch Marketing organization helpful.

Travel is required.

Employees who wish to be considered for this position should obtain a "Job Opportunity Salaried Position Available Application" form from Human Resources. All applications must be completed and received in the Human Resources Department by 4:00 p.m. on **26 March 2000**.

Answers to Level 6 Practice Problems

	Answer	Skill Category
1.	B	#1
2.	E	#1
3.	D	#2
4.	A	#2
5.	B	#2
6.	C	#3
7.	E	#3
8.	A	#4
9.	C	#4
10.	D	#4
11.	A	#4

Insert the "Improving to Level 7" Divider Here

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Improving to Level 7

Skills

Level 7 learners can demonstrate the skills outlined in the highlighted portion of the Reading for Information Skill Set table on p. 191.

Leveling

Indicators of Level 7 learning activities are listed in the highlighted portion of the Leveling Overview table found on p. 192.

Reading for Inf

Level	Description	Identifying Main Ideas & Supporting Details	Und
Level 3	• Short, direct passage • Elementary vocabulary • Information clear & complete	Identify main idea & supporting details	• Recogn word(• Recogn not de positio • Define (basic
Level 4	Level 3 skills plus: • Longer, more detailed & complex passage • Clear information; multiple factors to be considered • Elementary vocabulary that is slightly more difficult	Identify less obvious and/or embedded details; combine details	Use cont words n
Level 5	Level 4 skills plus: • More detailed & complex passage • Covers broader topics	Same as Level 4, using more complex text	• Define acrony contex • Use co words
Level 6	Level 5 skills plus: • Significantly more difficult text • Advanced vocabulary • Information not clearly stated	Extract & synthesize important information to find implied details	• Use cr define that ar • Use co comm meani
Level 7	Level 6 skills plus: • Difficult & dense text • Complex concepts • Difficult vocabulary	Same as Level 6, using more difficult & dense text like regulatory and legal documents	• Use co mon t • Isolate ating a choosi

ormation Skill Set

Skill Categories		
lerstanding Word Meanings	**Applying Instructions**	**Applying Information & Reasoning**
nize meaning of defined s) nize meaning of word(s) fined that show order, on, time work-related words , not job-specific)	• Involves few and uncomplicated steps • Determine what to do and when	N/A
ext to find meanings of ot defined	• Involves several steps & complicated instructions; may include conditionals • Order steps, consider cause-effect relationships, & select correct action	Consider changing circumstances in making a decision for a described situation
technical terms, jargon, & ms, from paraphrasing/ t; apply them correctly ontext to correctly define with multiple meanings	Involves more steps &/or details; more variables; includes conditionals	Apply information to a similar, but undescribed situation
itical thinking skills to technical terms & jargon e used out of context ntext to find the less on meaning of multi-ng word(s)	Same as Level 5, using more complicated text	• Apply complicated information to new situations • Determine general principles & rationale behind principles; generalize to related situations
ontext to define uncom-echnical terms & jargon e meanings by discrimin-among context clues, ing most important	Same as Level 6, using denser, complicated text	Determine general principles & generalize to unrelated & undescribed situations

Leveling			
Level Indicators	**Level 3**	**Level 4**	
Length	Short	Somewhat longer	
Complexity			
• **Detail**	Limited to needed information	More detailed than Level 3	
• **Clear/orderly**	All information clear; no reading between lines	Some details implied; no reading between lines	
• **Sentences**	Simple, short	Some complex sentences	
• **Paragraphs**	Short	→	
Vocabulary	Elementary; most words defined in text	Elementary, but more difficult; some undefined	
Instructions	Few steps; simple tasks	More steps; complicated instructions; may contain conditionals	
Application	N/A	Consider changing circumstances in making decisions	
Typical documents	Announcement; short memorandum; simple schedule or instructions	Job procedure with several steps	

Overview

Level 5	Level 6	Level 7
→	→	Long
Significantly more detailed; broader topics	More details; denser	More complex concepts
No reading between lines; more complex; somewhat less orderly	Some reading between lines; less logical order	More reading between lines
Mixed (some simple, some complex)	Complex, formal	Significantly longer, denser
Longer, more complex	→	Significantly longer, denser
Jargon/multiple meaning/ technical words; defined	Advanced; jargon & technical terms; some undefined	Hard; legalese; unusual words
Many steps &/or details; at least 1 conditional	Multiple steps & conditionals; complicated instructions	→
Apply information in text to similar, but undescribed situation	Apply complicated guidelines to given & undescribed tasks; generalize to similar	Generalize to unrelated situations
Health claims procedure; office equipment manual	Simple contract; some city codes	Complex legal document; corporate tax guide

Learning Activity 7.1—Merger

Materials

- Learning Activity 7.1 Learner Handout (pp. 198–199)
- Bay to Bay Cruise Lines letter dated November 1, 2000 (pp. 200–201)

Skills Addressed

If learners complete all of the assignments contained in this learning activity, they will practice each Level 7 skill and reinforce skills contained in Levels 3 through 6.

Prerequisite Skills and Activities

- Demonstrated competence in all Level 6 Reading for Information skills
- Give learners experience with passages containing legal text.

Instruction Methods

- *Assignments #1* and *#2* are best completed individually for both assessment and learning purposes. For additional and/or reinforced learning from Assignment #1, you may wish to create a class table or have learners work in teams to compare their tables.
- *Assignment #3* could be completed individually or in teams of 2–4. However, individual completion allows for more accurate assessment of Level 7 skills—assessment is especially important at Level 7 due to the complex nature of the materials and skills.
- Ask learners to complete all five parts of *Assignment #4* as a worksheet—individually. Then help them share and process their learning using methods such as those listed on the following page:

Hint: You will notice that Level 7 assignments contain less-detailed instructions than those in prior levels. Level 7 skills require higher-order thinking (e.g., reading between the lines, analyzing denser and more complex text); therefore, fewer and less-specific instructions are necessary for learners to gain Level 7 competence.

- *Item #2.* Learners' answers to Item #2 may differ. Arrange a mock trial to present a case for each side (i.e., the CEOs are sincere as indicated in answers C and E or they are insincere as indicated in answers A and D). Assign 2–3 lawyers for each side and a team of paralegals (3–5 in each team) for each side. Have the lawyers and their paralegals research legal precedents and correct legal vocabulary so they can present the most realistic cases. Depending on time constraints, let learners call witnesses. If not, simply have each side present their opinions and evidence. Have the remaining class members serve as the jury; you will be the judge.

  Hint: Preparing for and presenting a trial helps learners become familiar with and practice Level 7 vocabulary (e.g., legal words) as well as Level 7, Category #4 skills.

- *Item #3.* Have learners present their findings, then discuss them. This is an excellent opportunity for learners to gather real-world knowledge.

- *Item #4.* Facilitate a lively, but respectful, discussion about learners' findings. Work toward the goal of preparing them for challenges they may face in pursuing their career goals.

- *Item #5.* Redirect the prior discussion, focusing on learners' preparation plans. Through the discussion, help them build their confidence for dealing with the somewhat scary situations found in today's global business economy. Help them recognize that they are not powerless by challenging them to identify detailed, measurable goals like: seeking career training that prepares them to work in multiple industries and studying harder to maximize the knowledge they can gain in the classroom.

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Answers

Assignment #1

Technical Terms/Jargon	Definitions
Merge	The two companies become one
Leverage	Financial & marketing position
Shore (assignment)	Jobs on land
Restructuring	Changing organizational structure
Bulkhead	A ship's wall
Hull	A ship's underside
General construction	Common construction-related tasks like driving nails & screws, sanding
General maintenance	The types of tasks apartment maintenance workers perform
Sabbatical options team	The workers in payroll that will help staff with financial options
Merger team	Employees that will combine policies and procedures of both companies
Combined HR package	Merger team's product; it will contain items such as policies, procedures, employee manual, benefits package, and more
Ships' grapevines	Workplace gossip chain conducted by employees onboard ship
Home page	New company's web site

Acronyms	Definitions
HR	Human Resources Department
CEO	Chief Executive Officer

Legal Terms	Definitions
Joint venture	Merging two companies who will work together to benefit both
In whole or in part	Not even partially true
Implied or otherwise	Not even if reading between the lines
Sabbatical	Time away from work
Layoffs	Told not to come to work for a period of time
Notice of termination	An official, legal document telling an employee he/she is fired
Corporate law	Dealing with legal issues related to corporations
Filings	Legal documents to be prepared and filed with court or agencies (e.g., Secretary of State's office)

Multiple-Meaning Words	Definitions
Physical	Ship and office changes (e.g., new names, signs, office & worker moves)
50% capacity	Operating 1/2 the number of cruises typically sailing during the period
Calculating	Making numerical calculations
Post	Give written suggestions on line

Notes: Some terms could apply to categories other than those listed. Remember that the skill being addressed is *recognizing and defining uncommon terms*, **not** categorizing them. Many terms in this letter are business jargon; therefore, this exercise will help learners develop competence with business language.

Assignment #2

Letters should include these important written and implied details:

- My company and Pacific are merging on November 2.
- Their goal is to expand customers and services—make more money.
- We will operate at 50% capacity with senior staff for the first quarter, 2001.
- The CEOs say they want no terminations or layoffs, but don't promise it.
- Options for the first quarter for anyone not working the cruises are (1) an unpaid sabbatical or (2) merger jobs (if selected to perform them).
- [Tasks for which I want to apply]
- Company is offering financial options for those taking sabbatical.

Learners may include other details based on items that are important to them. For example, certain financial options may be important to someone planning to use the sabbatical alternative.

Assignment #3

Lists will vary based on learners' desires/plans. Two sample lists (one for someone choosing a sabbatical and another for someone applying for a merger job) follow:

Sabbatical	**Merger Job**
Determine how to spend sabbatical time	Choose appropriate merger activities
Determine how to finance it	Circle top 5–10 preferences
Contact HR immediately	Print name, bottom of page 2
Go see Payroll Dept.	Send letter to HR by 11/7
	Check out home page

Hint: When working toward Level 7, learners should have written their To-Do Lists in order of completion without being instructed to do so. For learning purposes, reduce points slightly if learners did not order their lists correctly.

Assignment #4

1. A, C, E

2. C, E

   Note: When judging the mock trial, help learners recognize that the majority (preponderance) of evidence indicates that the CEOs **are** sincere (Level 7 Practice Problems #5 and #6 illustrate this fact).

3. Responses will vary based on learners' experiences and those of the people in their networks and/or research. Use the 5Ws tool to assess the completeness of learners' assignments.

4. Responses will vary based on learners' opinions and research. Be sure opinions are supported by research data.

5. Responses will vary based on learners' opinions, personalities, and maturity levels. Challenge learners to list specific, detailed, measurable career preparation tasks.

For additional practice...

Have learners write a reflective essay or journal assignment describing how they would feel if they were Bay to Bay employees and received this merger letter. Have them pick out the words/phrases that caused them confusion and/or fear, and explain why. In addition, ask them to describe the elements of the total letter that caused them the greatest concern (e.g., the ambiguity about whether or not employees will have jobs after the merger that is apparent when one considers the document as a whole). Have learners end their essays by describing how they would respond (e.g., find another job, take the sabbatical, apply for a merger job). Encourage them to be creative. Help learners discuss the thoughts and feelings contained in their essays with one another.

Learning Activity 7.1—Merger

Learner Handout

Assignment #1

Using the Bay to Bay letter dated November 1, create a table of uncommon words/phrases and their definitions (derived from context clues). Include each of these categories—technical terms jargon, acronyms, legal terms, and multiple-meaning words.

Assignment #2

Write a letter or e-mail message to a girlfriend, spouse, parent, or friend that explains what is happening with your job situation. Include **only** the important information and implied details.

Assignment #3

Assume you are a new employee; therefore, you will not be working the cruises. How will you respond to the Bay to Bay letter? Make a To-Do List for yourself.

Assignment #4

Answer the following questions about the Bay to Bay letter.

1. What general principles do you think are behind this merger? (Choose all that apply.)
   A. The two companies are merging to make more money.
   B. What happens to employees is their primary concern.
   C. What happens to employees is their secondary concern.
   D. They will downsize employees.
   E. They might downsize employees.

2. What general principles do you think are behind this letter? (Choose all that apply.)
   A. The two companies want to manipulate employees to get the merger work done.
   B. The two companies want to employ as many workers as they can during the first quarter of 2001.
   C. The two companies are showing respect for employees by informing them before going public with the merger announcement.
   D. The companies are "buttering up" employees in preparation for the public announcement.
   E. The two companies want to keep as many employees working as they can, within the context of meeting business-related needs.

3. If a merger situation occurred at your current job (or a parent's current job), what general principles do you think would be driving the company? Why?

4. Do you think the majority of company mergers are handled like the Bay to Bay situation? What do you think is different? Why? Support your opinions with research information.

5. How can you prepare yourself for handling real-world career situations like mergers, company bankruptcy, downsizing, layoffs?

Bay to Bay Cruise Lines

777 Palm Way • Coronado, CA 97377 • 1-800-YOU-CRUZ

November 1, 2000

Dear Bay to Bay Employee:

Last month, Bay to Bay Cruise Lines decided to merge with Pacific Cruise Lines in a joint venture that will provide significant leverage to broaden the customer base and service opportunities for both companies. This partnership gives everyone involved exciting growth potential for many decades to come. The merger will be announced to the public tomorrow.

As you might imagine, a merger of this magnitude requires significant legal, financial, marketing, organizational, and physical changes. Since we are coming into the winter season, we decided to use this traditionally slow time to accomplish most of the necessary changes. Thus, the newly merged organization—Pacific Bay Cruise Lines—will operate cruises at 50% capacity between January and March, 2001. Of course, the most senior personnel will cover these cruises. The remaining cruise staff will be given shore assignments that support the merger tasks or a three-month unpaid sabbatical.

Currently, Pacific Bay Cruise Lines does not anticipate any layoffs or staff reductions. One of the top goals of our restructuring is to maintain employment for everyone at both Bay to Bay and Pacific. Therefore, this letter is not to be construed as a notice of termination or layoff, in whole or in part, implied or otherwise.

To help HR match your skills with merger tasks during the first quarter of 2001, please review the listed activities and circle any for which you have work/volunteer experience, schooling, or a strong desire to learn. Then **print** your name at the bottom of page 2 and return this letter to HR no later than November 7, 2000. You will be contacted by December 15, 2000 about your duties for the first quarter.

Merger Tasks

Dry Dock	*Financial*	*HR*	*Legal*	*Marketing*
• Welding • Hull painting • Sign installation • Bulkhead painting • General construction • General maintenance	• Developing accounting systems • Calculating • Financial reporting • Accounting clerks • Sabbatical options team	• Merger team* • Typing	• Corporate law • Negotiation • Filings • Legal assistants • Typing	• Writing (e.g., news releases, manuals, speeches, flyers) • Graphic designing • Market research • Video production • Modeling/acting

**Merger team members from both companies will work together to review both companies' policies and procedures, and develop a combined HR package for Pacific Bay Cruise Lines.*

If you wish to take advantage of the three-month sabbatical option, please **let HR know ASAP**. Some staff members have indicated a desire to use this time for schooling, home improvement projects, and traveling. (News travels fast on the ships' grapevines!) Personnel in the payroll division are prepared to supply a variety of financial options to support your sabbatical, like short-term loans against pension accounts, stock-related options, tuition reimbursements, and salary advances.

If you have any questions concerning the merger, please contact John Carter at x773 or Jill Baxter at x777. You can monitor our company vision and upcoming marketing events on our new home page at http://PacificBay.vision.aol.com. You can post suggestions there too, and we encourage you to do so!

We are looking forward to working with each one of you to create a new, stronger Pacific Bay team!

Sincerely,

Alec Gardner

Alec Gardner, CEO
Bay to Bay Cruise Lines

Respectfully yours,

Paul Williams

Paul Williams, CEO
Pacific Cruise Lines

Learning Activity 7.2—Government Regs

Materials

- Learning Activity 7.2 Learner Handout (p. 204)
- Revised Code pages (p. 205)

Skills Addressed

- Category #1: **Extracting and synthesizing important information from difficult, dense, and complex materials; identifying implied details**
- Category #2: Deriving word phrase meaning from context clues

Prerequisite Skills and Activities

- Demonstrated competence in all Level 6 Reading for Information skills
- Give learners experience with government regulatory text.

Instruction Methods

- *Assignment #1* can be completed individually or in teams of 2–4, depending upon your assessment needs and learners' skill levels.
- Have learners complete *Assignment #2* for homework. Then arrange learners into teams of 2–4 and have them compare and contrast their rewrites. Instruct each team to report to the class any differences they found among their rewrites and any additional learning derived from comparing and contrasting them. **Important!** Learners should have used the section titles to locate the paragraph that contains the information needed for this exercise. Check class reports to see if this fact is identified. If not, facilitate a discussion that helps learners realize that they need to use titles and headings as Reading for Information tools.

Answers

Assignment #1

Removal Provisions

With the advice and consent of the senate **and**:

- For inefficient or derelict discharge of his duties
- If the ethics commission shows a preponderance of evidence that a violation under Chapter 102, section 102.06 has occurred
- Failure to file or false filing of a statement required by section 102.02
- If appointee uses his office corruptly

Suspension Provisions

During a senate recess, the governor can suspend appointee for the listed reasons and report the facts to the senate at its next session.

Assignment #2

Learners' memos will vary. Check for accuracy and clarity, and that all key points are included.

For additional practice...

- Provide some case studies about removal and suspension of appointees and/or ethics situations and have learners use the Revised Code pages to complete them.

- Obtain copies of your city and/or township codes and have learners use them in completing exercises similar to Learning Activity 7.2 and/or relevant case studies.

Learning Activity 7.2—Government Regs

Learner Handout

Assignment #1

Using the Revised Code pages, list all reasons for which a governor-appointed staff member can be suspended and removed from office.

Assignment #2

Rewrite the Revised Code paragraph 3.04 in memorandum form so that **any lay person** could understand the reasons for suspending or removing an appointee.

RELATED SECTIONS

1.03 Definition of "anything of value"

As used in any section of the Revised Code for the violation of which there is provided a penalty or forfeiture, unless the context otherwise requires, "anything of value" includes:

(A) Money, bank bills or notes, United States treasury notes, and other bills, bonds, or notes issued by lawful authority and intended to pass and circulate as money;

(B) Goods and chattels;

(C) Promissory notes, bills of exchange, orders, drafts, warrants, checks, or bonds given for the payment of money;

(D) Receipts given for the payment of money or other property;

(E) Rights in action;

(F) Things which savor of the realty and are,at the time they are taken, a part of the freehold, whether they are of the substance or produce thereof or affixed thereto, although there may be no interval between the severing and taking away;

(G) Any interest in realty, including fee simple and partial interest, present and future, contingent or vested interests, beneficial interests, leasehold interests, and any other interest in realty;

(H) Any promise of future employment;

(I) Every other thing of value.

3.04 Governor may remove or suspend appointee

When not otherwise provided by law, an officer who holds his office by appointment of the governor with the advice and consent of the senate may be removed from office by the governor with the advice and consent of the senate, if it is found that such officer is inefficient or derelict in the discharge of his duties, if the ethics commission created by section 102.05 of the Revised Code has found, based upon a preponderance of the evidence, that the facts alleged in a complaint under section 102.06 of the Revised Code constitutes a violation of Chapter 102. of the Revised Code, if the officer fails to file or falsely files a statement required by section 102.02 of the Revised Code, or if it is found that he has used his office corruptly. If, in the recess of the senate, the governor is satisfied that such officer is inefficient, derelict, committed such violation of Chapter 102. of the Revised Code, or corrupt, he may suspend such officer from his office and report the facts to the senate at its next session. If in such report the senate advises and consents to the removal, such officer shall be removed, but otherwise he shall be restored to his office.

101.34 Ethics committees; powers and duties

(A) There are hereby created a house legislative ethics committee and a senate legislative ethics committee to serve each house of the general assembly. Each committee shall be composed of six members, three each from the two major political parties and each member shall serve on each committee during his term as a member of that general assembly. The members of each committee shall be appointed by the speaker of the house and the president of the senate and the minority leaders of each house. A vacancy in either committee shall be filled for the unexpired term in the same manner as an original appointment. The members of each committee shall meet and proceed to recommend an ethics code not later than thirty days after the first day of each session of the general assembly.

(B) Each legislative ethics committee:

(1) Shall recommend a code of ethics which is consistent with law to govern all members and employees of each respective house of the general assembly and all candidates for the office of member of such house;

(2) May receive and hear any complaint which alleges a breach of any privilege of the appropriate house, or misconduct of any member, employee, or candidate, or any violation of the appropriate code of ethics;

(3) May obtain information with respect to any complaint filed pursuant to this section and to that end may enforce the attendance and testimony of the witnesses, and the production of books and papers;

(4) May recommend whatever sanction is appropriate with respect to a particular member, employee, or candidate as will best maintain in the minds of the public a good opinion of the conduct and character of members and employees of the general assembly;

(S) May recommend legislation to the general assembly relating to the conduct and ethics of members and employees of and candidates for the general assembly;

(6) Shall act as an advisory body to the general assembly and to individual members, candidates, and employees on questions relating to possible conflicts of interest;

(7) Shall provide for the proper forms on which the statement required pursuant to section 102.02 of the Revised Code shall be filed and instructions as to the filing of the statement.

Chapter 102
PUBLIC OFFICERS—ETHICS

102.01 Definitions as used tn Chapter 102. of The Revised Code:

(A) "Compensation" means money, thing of value, or financial benefit. "Compensation" does not include reimbursement for actual and necessary expenses incurred in the performance of official duties.

(B) "Public official or employee" means any person who is elected or appointed to an office or is an employee of any public agency. "Public official or employee" does not include a person elected or appointed to the office of precinct, ward, or district committee member under section 3517.03 of the Revised Code, any presidential elector, or delegate to a national convention. "Public official or employee" does not include a person who is a teacher, instructor, professor, or any other kind of educator whose position does not involve the performance of, or authority to perform, administrative or supervisory functions.

(C) "Public agency" means the general assembly, all courts, any department, division, institution, board, commission, authority, bureau or other instrumentality of the state, a county, city, village, township, and the five state retirement systems, or any other governmental entity. "Public agency" does not include a department, division, institution, board, commission, authority, or other instrumentality of the state or a county, municipal corporation, township, or other governmental entity that functions exclusively for cultural, educational, historical, humanitarian, advisory, or research purposes; does not expend more than ten thousand dollars per calendar year, excluding salaries and wages of employees; and whose members are uncompensated.

(D) "Immediate family" means a spouse residing in the person's household and any dependent child.

Learning Activity 7.3—I Never Agreed to That!

Materials

- Learning Activity 7.3 Learner Handout (p. 208)
- Franklin County Hardware Application (p. 209)

Skills Addressed

- Category #2: **Deriving word/phrase meaning from context clues**
- Category #1: Extracting and synthesizing important information from difficult, dense, and complex materials; identifying implied details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 6 Reading for Information skills
- Give learners experience with dense, complex text, and uncommon words.

Instruction Methods

- *Assignment #1* can be completed individually or in teams of 2–4, depending upon your assessment needs and learners' skill levels.
- For variety, organize teams and have learners complete *Assignment #2* collectively. Alternatively, you may wish to facilitate a game show environment for completing learners' word quizzes.
- Be sure to help learners recognize the importance of reading a document carefully before signing it.

Answers

Assignment #1

Learners should use terms from this list in their quizzes.

- (Facts) set forth
- By itself and with no other factors
- Sufficient cause
- Undergo
- (Willing to) submit to
- Employment practices
- Release
- Liabilities
- Disclosures
- Non-bargaining unit position
- Arbitrate
- Legal force and effect

They may find others too; confirm that they chose difficult vocabulary. Check quizzes for completeness and answer sheets for accuracy.

For additional practice...

Ask learners to collect applications from places they would like to work. Have them redo Assignment #1, using the applications they collected. Use the learner-created quizzes for regular practice by having each learner complete a different application quiz every week.

Learning Activity 7.3—I Never Agreed to That!

Learner Handout

Assignment #1

Write at least ten questions resembling those found in the Work Keys Reading for Information assessment (i.e., the Practice Problems found at the end of each learning level in this book) for the difficult vocabulary (words or phrases) found in the bottom portion of the Franklin County Hardware application. Write an answer sheet for the questions too.

Assignment #2

Complete someone else's quiz. Use the answer sheet to check your answers.

Franklin County Hardware
Employment Application
Page 2

Employment History
List past and present jobs, beginning with the most recent.

Company Name and Address: Dates Employed:

Contact Person: Telephone:

Position/Job Duties:

Reason for leaving:

Please read the following information carefully, then sign below.

I acknowledge that the facts set forth in this application, as I have completed it, are true and complete. I understand that if I am employed by Franklin County Hardware (hereinafter referred to as FCH), any false statement or omission on this application or any attachment thereto shall be, by itself and with no other factors, sufficient cause for termination of my employment by FCH. In addition, I understand, because it has been explained to me by at least one FCH employee, that this company operates seven days a week and that if I am employed by FCH, I may be scheduled to work any time or day of the week, including such holidays that the store remains open.

I understand that before I am hired, FCH may require me to undergo a physical examination and/or drug or alcohol test by doctors and at facilities selected by the company. I agree to, and am willing to submit to, such examination and/or test. I also understand that if I am hired, FCH may require that I take a drug and/or alcohol test at any time during my employment. I agree to take such test at any time requested.

Further, I understand that FCH offers employment without regard to race, color, national origin, sex, religion, disability, or age; and that the company follows employment practices that support equal employment opportunities for all individuals. If I am hired by the company, I agree to follow said employment practices fully in the context of completing my duties for FCH.

I authorize FCH to use its personnel or any investigative agency to investigate my employment record, health, education, criminal conviction record, and financial record. I also authorize all my employers and former employers, references, credit reporting agencies/bureaus, medical facilities, educational institutions and any other person(s) contacted by FCH employees to provide the company with all records and information relevant to my employment application with FCH. I release all parties who provide such records or information from all liabilities arising from such disclosures; and I waive any rights to notice of such disclosures.

If I am hired into or later transferred or promoted to a non-bargaining unit position with FCH, I agree to arbitrate any claim, controversy, dispute, or complaint arising out of or relating to the termination of my employment under any company arbitration policy and/or procedure which exists at the time of the termination of my employment and for which I am eligible.

I hereby authorize FCH to copy this document and agree that any such copies with my signature shall have the same legal force and effect as the original document containing said signature.

Signature: Date:

Learning Activity 7.4—Assessing Organizational Performance

Instructor's Guide

Materials

- Learning Activity 7.4 Learner Handout (p. 212)
- South Carolina Organizational Self-Assessment Procedures (pp. 213–214)

Skills Addressed

- Category #3: **Understanding and using dense, complicated instructions that contain several steps and conditionals**
- Category #1: Extracting and synthesizing important information from difficult, dense, and complex materials; identifying implied details
- Category #2: Deriving word/phrase meaning from context clues

Prerequisite Skills and Activities

- Demonstrated competence in all Level 6 Reading for Information skills
- Give learners experience with following multiple steps within complicated instructions.

Instruction Methods

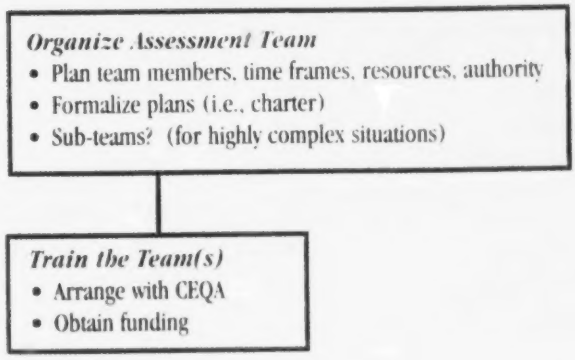
- Organize learners into teams of 2–4 to complete *Assignment #1*. Encourage them to discuss team members' strengths and weaknesses, and use that information to organize the team's work. Help them recognize that such up-front planning saves time over the life of a project and results in a higher-quality product because it maximizes the team's resources.
- Have learners complete *Assignment #2* individually so that you can more accurately assess whether they are gaining competence in Level 7, Category #3 skills.

Answers

Assignment #1

Learners can choose from a variety of visual organizers to complete this assignment. Check them against the South Carolina procedures for information accuracy. There should be ten steps (including follow-up), with an explanation for each step. The sample flow chart illustrates a visual organization of the first two steps.

Self-Assessment Steps


Organize Assessment Team
• Plan team members, time frames, resources, authority
• Formalize plans (i.e., charter)
• Sub-teams? (for highly complex situations)
Train the Team(s)
• Arrange with CEQA
• Obtain funding

Assignment #2

Learners' document package lists should include:

- South Carolina Procedures (pp. 213–214)
- Instructions Illustration (i.e., completed for Assignment #1)
- Self-Assessment Survey
- Quality Evaluation
- Scoring Summary
- Final Scoring Summary
- Final Report Sample

While no other documents are cited in the South Carolina procedures, you may wish to allow for some creativity if learners include appropriate additions to their lists.

For additional practice...

Collect several sets of complex instructions that learners will find relevant to their lives (e.g., preparing a resume, clearing a paper jam in a copier, arranging for health insurance coverage, applying for college admission). Have them follow the instructions to complete the task (e.g., use the instructions to write a resume). Give learners a different hands-on project to complete each month.

Learner Handout

Assignment #1

Using the information contained in the South Carolina Organizational Self-assessment Procedures found in Learning Activity 7.3, **illustrate** the instructions for conducting an organizational assessment.

Assignment #2

Imagine you are the team facilitator for your company's self-assessment process. Your team is meeting for the first time tomorrow and you want to prepare a documents package to give each participant—props for your explanation of the self-assessment process. What documents should you include in the package?

PROCEDURES

After the agency decides to conduct a self-assessment, the following procedures delineating the conduct of the assessment process, as pictured in Figure 2, should be followed.

Assessment Team Chartered

The Agency Director creates the Self-Assessment Team by formal charter. This charter identifies the team members, specifies time frames, allocates resources, and serves as the authority for the team members to conduct the self-assessment. The team should be cross-functional, i.e., all divisions and functions of the agency should be represented. It should also include members from a variety of responsibility levels. An example team charter can be found in Attachment 4.

In some instances, additional teams may be necessary in order to reach all portions of a widely-dispersed agency or to evaluate a highly complex function such as information systems. In all cases, the additional teams are chartered by the agency director as elements of the assessment team.

Training

If the team requires training, the Center for Education, Quality and Assessment (CEQA) is prepared to conduct training sessions at minimal cost. The training is based on an analysis of their own agency to which the team will apply the various assessment tools, and derive a final evaluation.

Facilitation

CEQA and the South Carolina Quality Network are prepared to provide team facilitators trained in both facilitation skills and the self-assessment criteria. The purpose of these individuals is to assist the team in focusing on the tasks at hand in a non-authoritarian manner.

Assign Team Responsibilities

The first meeting of the assessment team should have as its primary focus the assignment of specific evaluation tasks to specific individuals and groups. This is particularly important if several teams are used. For example, in a large, state-wide agency, individual assignments may be made on a regional or facility-by-facility basis. Milestones should also be set at this meeting, delineating when each major task is to be accomplished.

Interview and Visit as Needed

The assessment strategy is for *each member* or sub-team to evaluate independently the performance of the agency in each of the seven categories. Then, the team as a whole should derive a consensus evaluation of the agency from the individual scores. Each team member or sub-team should endeavor to gain, through interviews, visits, conversations and observations, knowledge sufficient to respond to the Survey questions and Quality Evaluation summaries. They must be allowed the time and resources necessary to complete these requirements.

Complete Survey and Quality Evaluation

Each team member should first complete the Self-Assessment Survey, followed by the Quality Evaluation. The Survey provides a vehicle for the assessors to become acquainted with all parts of the organization and provides an initial appraisal of the agency as a whole. After the Survey is done *individually*, the assessors should then complete the Quality Evaluation *individually*. The knowledge gained through the Survey should be of major benefit in identifying agency strengths and areas for improvement. It is possible that the assessor may revise the Survey scores based on the knowledge gained through the Quality Evaluation. This is to be expected and is encouraged. After both the Survey and the Evaluation are completed, the scores should be transferred to the Scoring Summary.

Derive Consensus

Using the Scoring Summaries, the team as a whole should compare and discuss the various scores in each of the categories. Particular attention should be paid to listed strengths and areas for improvement. Final scores for each of the categories and sub-categories should be agreed

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upon and listed in the Final Scoring Summary. A final list of strengths and areas for improvement should also be determined by the team and appended to the Final Scoring Summary.

Multi-voting is recommended as an effective technique to achieve consensus. The facilitator becomes very important to this process as the catalyst for attaining final consensus.

Write Final Report

The team should have included in its milestones and responsibility assignments the task of writing the Final Report. This should be accomplished will all due deliberate speed so as not to lose the momentum for process improvements generated by the execution of the assessments.

Deliver Report

The Final Report should be read by each member of the assessment team and individually signed. The team leader should then deliver it to the agency director. If any team member cannot in good conscience sign the Final Report due to irreconcilable differences with the contents, he or she should write an addendum to the report to be delivered concurrently.

FOLLOW-UP

The process of conducting an organizational self-assessment tends to create an environment of rising expectations within an agency's employees. It is important to follow up the self-assessment with feedback concerning a plan to take action to improve those areas identified as benefitting from improvement. If this is not done fairly soon after completion of the Final Report, unfulfilled rising expectations can easily turn into employee cynicism regarding the commitment of the management team and the purpose of the self-assessment. The State Office of Human Resources is prepared to assist in the preparation of action plans and presentations to the agency's employees, and to facilitate follow-up process improvement activities, if the agency so desires.

"The Malcolm Baldrige National Quality Award has become the most important catalyst for transforming American business. More than any other initiative, public or private, it has reshaped managers' thinking and behavior."

- David A. Garvin, Ph.D.
Harvard University

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Learning Activity 7.5—Assessing the Learning Environment

Materials

- Learning Activity 7.5 Learner Handout (p. 217)
- South Carolina Organizational Self-Assessment Procedures (pp. 213–214)

Skills Addressed

- Category #4: **Determining general principles and generalizing to unrelated and undescribed situations**
- Category #1: Extracting and synthesizing important information from difficult, dense, and complex materials; identifying implied details

Prerequisite Skills and Activities

- Demonstrated competence in all Level 6 Reading for Information skills
- Provide opportunities for learners to practice critical thinking skills.

Instruction Methods

- Organize learners into teams of 2–4 to complete *Assignment #1*. Let teams present their lists, then facilitate a class discussion that compares and contrasts the lists.
- Have learners complete *Assignment #2* in teams of 2–4, giving each team a different portion of the assignment (e.g., team 1, item 1). Let teams work interdependently—similar to the framework described in the second paragraph of *Assessment Team Chartered* in the South Carolina procedures document—to create a cohesive total plan. If you have enough learners, create two sets of teams so that two total plans are created, then help learners compare and contrast the plans and the processes used to create them.

Hint: You may wish to provide a few hours of class time each week over a few weeks for learners to complete this project.

Answers

Assignment #1

Learners' lists should include:

- Give the assessment team the power to do their job (i.e., formal charter, team member selection).
- Equipment the team for the job (i.e., training, forms, CEQA assistance, directions outlined in procedures).
- Provide specific direction for the team to follow (i.e., assign tasks, create due dates).
- Conduct a comprehensive assessment (i.e., detailed methods to follow, gaining consensus).
- Use the assessment results to improve performance (i.e., follow-up instructions).

Assignment #2

Encourage independent thought and creative solutions. However, make sure learners provide realistic solutions, and that their responses to each item are complete and are likely to meet the goals established by the underlying principles.

For additional practice...

Have learners repeat Assignment #2, using their current or favorite job situations.

Learning Activity 7.5—Assessing the Learning Environment

Learner Handout

Assignment #1

List the general underlying principles behind the South Carolina procedures used in Learning Activity 7.4.

Assignment #2

Apply these principles to your learning environment, as follows:

1. Summarize your learning environment situation in one paragraph.
2. Who should participate in the assessment team?
3. How will they have the power to complete the task?
4. How would you equip them for the job?
5. Write specific directions for the team to follow in completing a **comprehensive** assessment.
6. Write specific follow-up instructions designed to ensure that the assessment results are used to improve performance in your learning environment.

Level 7 Practice Problems

These practice problems resemble those found in the Work Keys Reading for Information assessment. Circle the correct answer for each item.

Use the Bay to Bay Cruise Lines Merger letter (pp. 200–201 in Learning Activity 7.1) to answer questions 1–6.

1. What options do senior staff members have for the period of January 1 through March 31, 2001?
   A. Working on cruise ships
   B. Taking a sabbatical
   C. Doing merger tasks
   D. Taking three months of vacation time
   E. Taking sick leave

2. What clues contained in the letter indicate that the company is soliciting employees' ideas?
   A. It lists being on the Merger Team as a task option.
   B. The company's home page was designed to include a suggestion-posting option.
   C. It encourages employees to post suggestions.
   D. The CEO signed it, "Sincerely."
   E. A, B, and C.

3. The phrase *a three-month unpaid sabbatical* is found in the last line of the second paragraph. Assume you were the last employee hired and you have no experience in any of the merger tasks listed. From your perspective, you might interpret the sabbatical phrase to mean that you are likely to experience:
   A. An unpaid leave of absence.
   B. A layoff.
   C. A vacation.
   D. A termination.
   E. A three-month probationary period.

4. The first two sentences in the third paragraph mean:
   A. The new company is promising not to downsize anyone.
   B. The new company is promising not to terminate anyone.
   C. The new company is promising no permanent layoffs.
   D. The new company wants to keep all current employees working, but is not promising anything.
   E. The new company is promising not to downsize, terminate, or permanently layoff anyone.

5. What facts indicate that the CEOs are sincere in their goal to keep all employees on the payroll?
   A. Bay to Bay's history of respect for and support of their workers (as evidenced in Learning Activities 3.1, 4.1, 5.1, and 6.1)
   B. The new company's willingness to give pay advances for sabbatical time
   C. The statement in the last line of the letter (i.e., "looking forward...with *each* of you.")
   D. The Bay to Bay CEO's closing ("Sincerely")
   E. Items A, B, and C

6. What facts could cause doubt about the CEOs' sincerity?
   A. No promises in the letter
   B. Lack of knowledge about how Pacific Cruise Lines treats its employees
   C. General knowledge that **all** companies are disloyal to workers
   D. General knowledge that money talks
   E. No promises in the letter and lack of knowledge about how Pacific Cruise lines treats its employees

7. In Learning Activity 7.2, *Government Regs* (p. 204), what does *Regs* mean?
   A. Registration
   B. Regulators
   C. Regulations
   D. Regrets
   E. Regions

8. As used in paragraph 2 of the Franklin County Hardware Employment Application (p. 209 in Learning Activity 7.3), *I am willing to submit to* means:
   A. I will take the physical exam and/or drug and/or alcohol test.
   B. I will relinquish my rights to a physical exam and drug and/or alcohol test.
   C. I will go to my doctor for a physical exam and/or drug and/or alcohol test.
   D. I will give a physical exam and/or drug and/or alcohol test.
   E. I will help with a physical exam and/or drug and/or alcohol test.

9. As used in the next-to-the-last paragraph of the Franklin County Hardware Employment Application, *non-bargaining unit position* refers to:
   A. A non-sales position.
   B. A non-union position.
   C. A position that gives me no bargaining power.
   D. A high-paying job.
   E. A low-paying job.

10. According to the South Carolina procedures (pp. 213–214 in Learning Activity 7.4), the primary focus of the assessment team's first meeting should be:
    A. Explaining the procedures.
    B. Distributing the necessary paperwork.
    C. Assigning specific tasks to specific individual and setting due dates.
    D. Organizing several sub-teams.
    E. Reporting to management.

11. Why is follow-up so important in any assessment process?
    A. To ensure the information gathered is used to make improvements
    B. To make the team look good
    C. To ensure pay raises
    D. To complete an assessment project
    E. To impress the boss

12. Why are detailed, specified procedures important in any assessment process?
    A. To help the team do a quality job
    B. To ensure return on investment of time and resources
    C. To ensure the information gathered is used to make improvements
    D. To help the team do a quality job and to ensure return on investment of time and resources
    E. To help the project leader monitor team members to make sure they do their jobs.

Answers to Level 7 Practice Problems

	Answer	Skill Category
1.	A	#1
2.	E	#1
3.	B	#2
4.	D	#2 and #3
5.	E	#1 and #4
6.	E	#1 and #4
7.	C	#2
8.	A	#2
9.	B	#2
10.	C	#3
11.	A	#4
12.	D	#4

Notes

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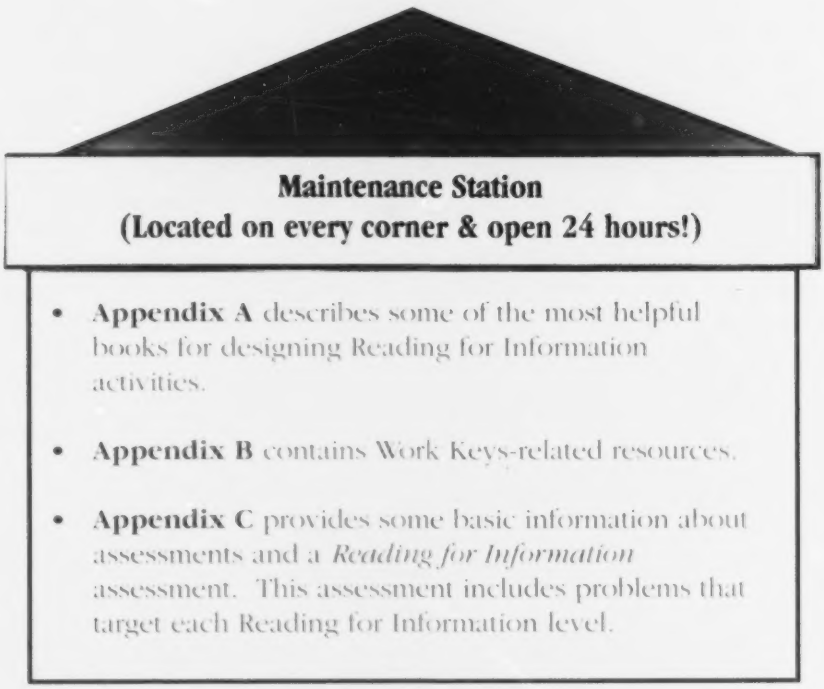
Section IV: Appendices

This section contains resources that will help instructors develop learning activities and assessments. The resources are divided into three categories:


Maintenance Station
(Located on every corner & open 24 hours!)
• Appendix A describes some of the most helpful books for designing Reading for Information activities.
• Appendix B contains Work Keys-related resources.
• Appendix C provides some basic information about assessments and a Reading for Information assessment. This assessment includes problems that target each Reading for Information level.

Appendix A: Resources

This list is intended to help you get started. Other resources are available from libraries and vocational classrooms. More importantly, you will want to collect case studies and real workplace documents in your community. (More information about collecting real-life reading materials can be found in *About Workplace Documents*, p. 14.)

Books

American Association for Vocational Instructional Materials (1985). *Assist Students in Achieving Basic Reading Skills.* Module M-1 in the Professional Teacher Education Module Series. Winterville, GA: American Association for Vocational Instructional Materials.

This module relates reading instruction to occupational requirements, providing activities that can be used for assessment and strategies for improving reading skills. The strategies target teaching technical vocabulary, providing practical reading knowledge, facilitating reading games, giving individualized reading support, and providing reinforcement and practice.

Center for Education and Training for Employment (1997). *Workplace Literacy Teacher Training: Strategies for Instruction.* Columbus, OH: The Ohio State University.

This series of learning guides offers sound strategy knowledge and practical "how tos" for teaching basic skills. Thus, these learning guides are an excellent prerequisite for using any of the books in the *Targets for Learning* series. Written in practical language and linked to real workplace situations, the guides are user-friendly for teachers, trainers, and lay persons (e.g., parents, mentors, tutors).

Herrmann, Beth Ann, Editor (1994). *The Volunteer Tutor's Toolbox.* Newark, DE: International Reading Association.

This book provides practical tools that are especially useful for reading tutoring. Parents will find these easy-to-use activities and instructional tools very helpful too.

Lankard Brown, B. (1998). *Applying Constructivism in Vocational and Career Education.* Columbus, OH: ERIC Clearinghouse, The Ohio State University.

Constructivism (a learning theory based on the premise that people learn by constructing their own meanings) is being used more frequently by educators as they seek to connect learning with the world of work. This book describes the attributes of constructivism, explains connections to other learning theories, illustrates applications in career and vocational education, and explores how technologies such as the Internet facilitate constructivist learning. It provides a depth of instructional knowledge from which to help learners develop skills that will equip them to meet the growing challenges they face in the workplace.

Margulies, Ph.D, Stuart (1998). *Work Force Literacy Skills for Jobs 2000, Book 2.* New York, NY: Educational Design, Inc.
This student workbook was designed to teach students such communication skills as how to interpret rules and regulations, how to read and understand documents students will encounter in daily living as adults, and how to sort out the meaning of things they read and hear. It is full of effective exercises that are practical and easy to use.

Moore, L. (1992). *Improving Workforce Basic Skills: The Foundation for Quality.* White Plains, NY: Quality Resources.
This book provides a problem-solving approach to basic skills training in the workplace. Information about designing instruction systems and creating a freedom-to-learn environment is included.

Sticht, T. and B. McDonald (1992). *Office Technology-Information Processing Skills: Reading.* Westerville, OH: Glencoe Division of Macmillan/McGraw-Hill School Publishing Company.
This very practical book from the Glencoe Occupational Adult Learning Series provides relevant, real-life practice exercises. It is an excellent resource for learning activity ideas.

Sweet, A. (1993). *State of the Art.* Washington, D.C.: U.S. Department of Education.
The 12 pages in this publication give a solid, quick refresher and/or primer for anyone interested in providing reading instruction, including tutors, parents, and trainers. It provides general background information about successful teaching strategies for reading instruction.

Professional Journals

English Journal published by the National Council of Teachers of English (Urbana, IL).
This journal, published eight times per year, is written by teachers for teachers in the middle school through high school grades. It contains quality, thought-provoking articles about theory, practice, and new ideas in learning, reading, and writing in the classroom.

Journal of Reading published by the International Reading Association (Newark, DE).
In eight issues per year, the journal offers peer-reviewed articles concerning research, theory, and practice. It targets a broad group in the academic audience—those interested in teaching reading to middle school through college learners, as well as adult learners. Regular departments in the magazine provide information about current issues in reading and classroom materials, and research summaries.

Note: References are cited throughout the book, but are not listed here unless they are also resources for the wide scope of Reading for Information instruction.

Appendix B: Work Keys-Related Resources

American College Testing Program (1997). *Targets for Instruction: Reading for Information.* Iowa City, IA: ACT, Inc.

This book presents detailed descriptions of the Reading for Information skill area and the characteristics that distinguish each skill level.

Other books in the ACT *Targets for Instruction* series cover skills in these subjects: applied mathematics, applied technology, listening, locating information, observation, teamwork, and writing.

Thinking Media™ (1997). *Reading for Information from the KeyTrain™ CD-ROM Series.*

This CD-ROM is part of a series designed specifically for the Work Keys® system. The KeyTrain materials provide instruction about reading workplace documents and include practice problems. They can be used by learners independently. Additional information can be found at www.keytrain.com.

Worldwide Interactive Network (1998). *Reading for Information* from the WIN Work Keys Instruction Solution Series.

This self-directed student workbook is designed specifically to the level of proficiency required for each level of the Work Keys skill scale and includes skill enhancement activities, exercises, suggestions, and related information and resources. Additional information about the series can be found at www.W-WIN.com.

The Ohio State University. *Targets for Learning: Reading for Information.*

This is one in a series of instructor guides that support the ACT Work Keys® system. The instructional strategies and learning activities contained in the guides help learners gain proficiency by practicing workplace skills in real-life situations. Learning gains can be measured by Work Keys assessments. Other books in the series cover applied mathematics, applied technology, and locating information.

Work Keys related resources are distributed by The Ohio State University's Center on Education and Training for Employment. The sales office can be reached at 800-848-4815. In addition, the Center provides instruction and coaching that prepares users to effectively apply the *Targets for Learning* materials to their learning environments. For more information, contact their National Training Academy directly at 800-848-4815 or 614-292-8300.

Appendix C: Assessing Learners' Skill Levels

Appendix C offers assessment background knowledge and tools, as described below:

About Assessment and Developing Opinions

These two sections provide background information concerning the importance of assessing learners, traditional assessment theories, and emerging assessment theories.

Assessing Reading for Information Skills

This final section of background information addresses the assessment function as it relates specifically to reading skills.

Test-Taking Hints

This sheet provides learners with instructions and helpful hints for taking the Reading for Information assessment. It should be given to learners who are taking the assessment provided in this appendix. It can be used as a general test-taking tool too.

Reading for Information Assessment

This assessment tool can be used as a pretest, a post-test, or a practice test.

Reading for Information Learner's Assessment Response Sheet

This sheet should be used by learners to record their answers to the Reading for Information assessment. It should be given to learners who are completing the Reading for Information assessment provided in this appendix.

Answers to Reading for Information Assessment

This sheet lists the answers to the Reading for Information assessment found in this appendix.

Learner's Test Score Summary Sheet

This chart was designed for learners. Once tests are scored, learners mark a "✓" in the appropriate box for each correct response. They mark an "X" in the appropriate box for each incorrect response. Then they determine their Work Keys level by tallying their incorrect responses; if two or more problems are missed at a level, their learning intervention should begin at the next *lower* level.

Reading for Information Summary Sheet

Instructors can use this sheet to summarize Reading for Information assessment scores of learners in their classes. It can also be used to record learners' progress as they participate in learning activities and complete practice problems from *Targets for Learning*.

About Assessment

Assessment is important for several reasons, including:

- Assessment helps instructors document the gains made by learners.
- Assessment gives learners information about their current skill levels and helps them recognize their improvements.
- Assessment results can be used to show funders the effectiveness of an intervention program.
- Completing assessments will give learners practice in taking Work Keys tests.

Traditionally, pen-and-paper tests have been the most common method of evaluating learning. More and more, instructors are supplementing their quizzes and tests with other kinds of assessments that provide different, sometimes more accurate, and valuable information such as journal assignments, observation (as learners complete hands-on learning assignments), portfolios, self-critiques, and many more. Several types of evaluation methods are suggested in the Instructor Guides for each learning activity in this book.

Developing Opinions

The American Management Association, most industry training experts, and all of the business people interviewed for this book agree on one fact—to be effective, tests must be job specific. The workplace experience of these users indicates that testing general academic knowledge through norm-referenced tests does not provide the information businesses need because the results of such tests are not accurate in a workplace context. Instead, such experts recommend tests like those used by the U.S. Army (e.g., Job Skills Education Program) because they assess an individual's readiness to be trained in a job against the actual demands of the job and the worker's basic skills mastery or prior knowledge.

Many experts in the academic world agree; therefore, they are moving away from formal standardized tests and toward authentic assessments (e.g., portfolios, application tests—a learner who is studying to be a chef prepares food). Authentic assessments allow instructors to collect ongoing, descriptive information about individual learners' progress. However, instructors still use traditional testing methods when they provide an accurate evaluation of the learning. For example, several multiple-choice questions are used in this book to assess a learner's ability to define and apply technical terms, jargon, and multiple-meaning words. These questions do not ask for dictionary definitions, rather they are written in a manner that makes the learner demonstrate his/her ability to define and use the term. **Important!** Please note that the traditional testing items contained in *Targets for Learning: Reading for Information* and in the Work Keys assessments are designed in this application-oriented fashion.

Assessing Reading for Information Skills

Whatever assessment(s) you choose for measuring reading skills, **exercise caution**—especially when using an assessment tool to measure learner performance. Assessment is not an exact science because it provides a relative rating only. In addition, research has found that even highly proficient readers often are unable to articulate or demonstrate specific reading skills. Thus, competence in reading skills **does not equal** the ability to talk about those skills. For example, a learner may be able to **use** gerunds in a reading exercise but cannot identify a gerund (i.e., a verbal noun ending in *-ing* like *reading*) in a sentence.

For the reasons described, **reading skills are best evaluated using authentic or experiential assessments** such as monitoring a learner's ability to use his/her reading skills collectively in completing real-life work assignments. Also called informal assessments, they provide a holistic means of assessing developing proficiencies. Remember, the assessments need to be ongoing. Examples include anecdotal records, observation, having the learner listen to himself on tape, and collecting reading samples and chart growth over time. And all assessments should focus on what the learner is doing and why. (For additional information about assessment strategies, see *Workplace Literacy Teacher Training: Strategies for Instruction.*)

Reading for Information Assessment

It is highly recommended that instructors assess learners' reading skill levels prior to giving any instruction. (The reasons behind this important recommendation are explained in the section titled *Where Do I Begin?*, pp. 48–50.) Teachers may want to use the Work Keys Reading for Information Assessment because it has been scientifically prepared and normed. The practice problems in this book can be used for assessment purposes too. In addition, a Reading for Information assessment is provided on pp. 231–243 in this appendix. **Caution!** The assessment provided in Appendix C will give instructors and learners a general placement level and it will give learners practice in taking Work Keys assessments. However, it should be used only for instructional placement and practice purposes, because it has not been field-tested for statistical validity and reliability.

Test-Taking Hints

Review the test-taking hints listed and help learners practice them (e.g., provide several practice tests and discuss how learners used these tips) to prepare them for success with formal competency assessments like the Work Keys Reading for Information assessment.

- ✓ **Read the instructions** carefully. Make sure you understand the directions.
- ✓ **Budget your time** carefully. Don't spend so much time on one item that you are unable to answer others.
- ✓ Recognize the **theory behind multiple-choice tests**. Typically there are four or five answers for each item (i.e., A, B, C, D, and E). Each answer is a possible solution. Eliminate the answers you know are wrong, then check each remaining answer to see which best answers the question.
- ✓ **Start at the beginning.** Work Keys tests begin with easier problems and progress to more difficult ones. It is a competency test, so you must get the earlier problems correct in order to get credit for correct answers to the more difficult problems. For example, you must answer approximately 80% of Level 3 questions to be judged competent at that level. You cannot attain Level 4 until you are competent at Level 3 skills.
- ✓ **Focus on these steps** as you complete each test item:
    1. Read the question (and any reading passages) carefully—two times.
    2. Circle relevant and/or key information as you read.
    3. Ask yourself, "What does this item ask me to do?" (e.g., insert an answer, extract information, summarize, compare, decide, conclude?) and make a mental or written note. This technique keeps your mind clear for solving the problem at hand.
    4. Reread the question and/or passage, if needed.
    5. Eliminate incorrect answers, then select the correct one.
- ✓ Do not keep changing answers—your first choice is usually correct.
- ✓ Make a best guess for items you cannot figure out. (There is no penalty for guessing. Do not leave any items unanswered.) However, guess only after you have tried your best to answer a question.
- ✓ If you start to feel anxious or tense (e.g., warm, sweaty), **stop!** Take 3–4 deep breaths—inhaling slowly, then exhaling slowly. Then go back to the item or move to the next one.
- ✓ Research shows that sucking on peppermint candies improves test performance. (It's true! Try it!)

Reading for Information Assessment

Instructions: Use the Learner's Assessment Response sheet to record your answers.

Use the job advertisement below to answer the questions 1–3.

Mechanic Wanted

50-year-old car and truck service company needs FT mechanic. Need tools, certification, and minimum 2 years of related experience. Competitive salary and benefits. Contact Jimmy at 555-AUTO to apply.

1. The main point that this classified advertisement intends to convey is that:
   A. The company needs a full-time mechanic.
   B. The company is 50 years old.
   C. Tools, certification, and two years of experience are required.
   D. The company offers competitive salary and benefits.
   E. Applicants should call 555-AUTO.

2. What detail(s) found in the advertisement **best** develops the main idea?
   A. The company needs a mechanic.
   B. The company is 50 years old.
   C. Tools, certification, and two years of experience are required.
   D. The company offers competitive salary and benefits.
   E. Applicants should call 555-AUTO.

3. If you want to apply for the mechanic position, you must:
   A. Be certified.
   B. Know that the company is 50 years old.
   C. Have tools and two years of experience.
   D. Call 555-AUTO.
   E. A, B, and D.

Use this posted notice to answer questions 4–5.

Zone Meeting

Reminder: The next zone meeting for sales associates is Saturday, November 6th.

If you don't know which zone you belong to or where it meets, call Angel at 896-3377, ext. 247.

Please bring a current roster of your ordering clients.

4. Sales associates are:
   A. Employees.
   B. Employees that make sales calls on clients.
   C. Sales managers.
   D. Employees that record sales calls.
   E. Cash register clerks.

5. You are a new sales associate and you were not given a zone. Which is the **best** action you can take in this situation?
   A. Call Angel
   B. Mark your calendar for November 7th and ask another sales associate where to go
   C. Ask your supervisor
   D. Call Angel, mark your calendar, and check with your supervisor
   E. Call Angel to get your zone assignment and mark the date, time, and location on your calendar

Use the memo below to answer questions 6–10.

Industrial Space, Ltd.

M E M O R A N D U M

May 7, 2000

TO: James Carpenter, President

FROM: Barney Burns, Manager

RE: Lease Expiration

Greetings, Jim. It's that time of year again. Your lease expires on Monday, June 10th. Your firm is a valued tenant and we want you to stay. To get the paperwork completed as soon as possible, could you arrange to stop by our office in your building by May 31st? We would very much appreciate it.

Your new rental rate is $2 per square foot ($1600 per month). Should you choose to prepay your rent for a year, you will receive a one-month discount.

Thank you for your attention. If you have any questions, please do not hesitate to give me a call at 363-1111.

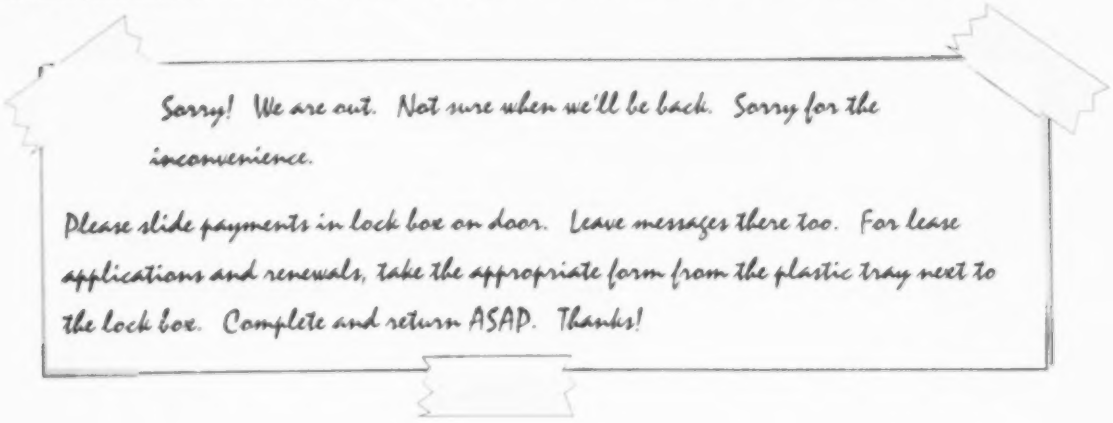
6. How much reduction in rent can James Carpenter expect if he pays annually?
   A. $1600
   B. 20%
   C. $3200
   D. 10%
   E. None

7. To complete the paperwork, Jim needs to visit:
   A. Barney Burns.
   B. His accountant.
   C. The lease office in his building.
   D. Barney Burns's office.
   E. No one; Mr. Burns will visit Jim.

8. The paperwork to be completed is:
   A. A new partnership agreement.
   B. A new map showing the square foot in Jim's office.
   C. The annual rental reports.
   D. The quarterly rental reports.
   E. A new lease agreement.

9. If the company has enough cash flow, prepaying the rent annually would be a wise business decision because it would:
   A. Save the company $1600 per year.
   B. Save the company over $3200 per year.
   C. Keep the company in good standing with the landlord.
   D. Allow the company to write one check instead of 12.
   E. Give the landlord more money for capital investments.

10. When Jim arrives to complete the paperwork, he finds this note on the door:


Sorry! We are out. Not sure when we'll be back. Sorry for the inconvenience.
Please slide payments in lock box on door. Leave messages there too. For lease applications and renewals, take the appropriate form from the plastic tray next to the lock box. Complete and return ASAP. Thanks!

Consider the situation (e.g., urgency, priority of this task to Jim, size of Jim's business) and decide which action Jim should take.
   A. Call Barney Burns and give him a piece of his mind
   B. Complete the form in the hallway and put it in the drop box
   C. Come back later when someone is in the office
   D. Take a form back to his office, complete it, and drop it off on his next trip out of the office
   E. Move

Use this page from an In-House SOP Manual to answer questions 11–17.

USA BLOOD DONOR BANK	IN-HOUSE SOP MANUAL
SUBJECT: PHYSICIAN SUBSTITUTE TRAINING PROGRAM	ISSUE DATE 10/12/97

6.0 PHYSICIAN DUTIES IN CENTERS WITH PHYSICIAN SUBSTITUTES.

6.1 Physician will review and countersign all abnormal laboratory results evaluated by the **PHYSICIAN SUBSTITUTE** (SPE's, STS, etc.) once a week.

6.2 Physician will review and countersign randomly selected physical examinations done by the **PHYSICIAN SUBSTITUTE** (new and repeat donors), including the informed consent and AIDS educational material, once a week.

6.3 Physician will review and countersign randomly selected charts which have involved a decision by the **PHYSICIAN SUBSTITUTE** (e.g., HCT evaluation, Blood Pressure elevation, Pulse check, intercurrent illness) once a week.

6.4 Physician will review and countersign all immunization records weekly, including approval of scheduled injections.

6.5 Physician will be available for consultation by telephone during the hours the **PHYSICIAN SUBSTITUTE** is on duty.

6.6 Physician must have prior approval by the Responsible Head in order to qualify for this coverage.

11. The physician substitute training program SOP was issued on:
    A. August 12, 1990.
    B. May 13, 1974.
    C. January 1, 2000.
    D. October 12, 1997.
    E. June 15, 1993.

12. An SOP provides:
    A. Testing standards.
    B. Procedures to follow in completing a work assignment.
    C. Guidelines for an operation.
    D. A list of duties.
    E. Both B and D.

13. If you are the physician, whose approval must you obtain to qualify for this coverage?
    A. The company president
    B. The nurse on duty.
    C. The responsible supervisor.
    D. The head of the donor center.
    E. The head donor.

14. The physician must spot check the physician substitute on:
    A. Physical exams and decisions.
    B. Abnormal lab results.
    C. Immunization records.
    D. Telephone consultations.
    E. All of the above.

15. You were recently hired by a long-term convalescent care facility as a substitute LPN. What document would help you succeed in your new job?
    A. A W-4 form
    B. An SOP-type document
    C. A benefits package description
    D. The facility's public relations documents
    E. An employment contract

16. How often must the physician review and countersign immunization records?
    A. Daily
    B. Weekly
    C. Every other week
    D. Monthly
    E. When he/she has time

17. How might you as a physician save time in training a physician substitute?
    A. Review procedures for handling items 6.1 through 6.4 with the physician substitute before he/she begins performing services
    B. Encourage the physician substitute to call any time he/she is not sure what to do
    C. Tell the physician substitute not to call you under any circumstances
    D. Delegate items 6.2 and 6.3 to a nurse
    E. Skip item 6.6

Use the following passage about microwave energy to answer questions 18 and 19.

Caution! Possible Exposure to Excessive Microwave Energy!

Microwave technology is used in this area of our building. Follow these precautions when working in this location.

- Do not attempt to operate any microwave unit with the door open since open-door operation can result in harmful exposure to microwave energy.
- Do not defeat or tamper with safety interlocks.
- Do not place any object between a unit front face and door or allow soil or cleaner residue to accumulate on sealing surfaces.
- Do not operate a unit if it is damaged. It is particularly important that the unit door close properly and that there is no damage to the door (bent), hinges and latches (broken or loosened), and door seals and sealing surfaces. Check these daily and report any problems immediately.
- Under no circumstances should any employee adjust or repair a microwave unit. Only properly qualified service personnel should be given access for such activities.
- If a unit cannot be shut off and the energy level reaches the red zone, immediately pull an alarm handle (located on all walls) and exit the vicinity.

18. What action should you take if a unit's energy level reaches the red zone?
    A. Exit immediately
    B. Pull the alarm
    C. Pull the alarm and exit
    D. Contact a supervisor
    E. Pull the alarm, then contact a supervisor

19. According to the passage, the biggest danger area for a microwave unit is a damaged door because:
    A. It has the most vulnerability to damage (e.g., bent door, broken hinges).
    B. The writer talks about door problems more than anything else.
    C. It has safety locks.
    D. Its safety locks are easy to defeat.
    E. Workers generally repair doors themselves.

Use the fax machine instructions on the following page to answer questions 20–24.

20. When the manual refers to a *line*, it means:
    A. A straight line.
    B. A clear line.
    C. A telephone cord.
    D. A telephone wire.
    E. None of the above.

21. If you answer the telephone after the fax machine connects and learn that it's a typical phone call rather than a fax, the manual instructs you to:
    A. Hang up.
    B. Ask the caller to call back.
    C. Run to the fax machine and press stop.
    D. Use the remote reception mode to activate the fax reception mode.
    E. Use the remote reception mode to deactivate the fax reception mode.

22. You are a busy executive. Your secretary is out sick today and you are trying to receive an urgent fax. You have picked up the telephone and have the fax call on the line. What is your next step?
    A. Hang up.
    B. Press the start key on the fax machine.
    C. Implement remote reception procedures.
    D. Press * and # simultaneously.
    E. Get secretarial help from another employee.

23. Why might you want to change the ring settings on your fax machine?
    A. To save time and noise by reducing the number and length of rings
    B. To reduce costs
    C. To make a customer wait to hear a fax tone
    D. To give staff time to answer a fax call
    E. None of the above

24. What mode should you use if you want total control of fax receipts?
    A. Fax reception mode
    B. Remote reception mode
    C. Manual reception mode
    D. Auto reception mode
    E. Parallel mode

Auto reception mode

1. When a call arrives, the fax machine will connect to the line after issuing a set of rings*.
2. The fax machine detects incoming fax signals and automatically switches into fax receiving mode after the initial ringing.

   ** RECEIVING **

3. If no fax signal is detected (as in case of voice calls or manual fax calls) after the first set of rings, the fax machine still connects to the line but does not switch to fax reception mode immediately. Fax reception starts only after a series of simulated rings** (second set of rings) are issued by the fax machine.

FAX/TEL parallel connection switch

If you use a single line for both fax and voice calls and connect other phones to the same line as the fax machine, it is necessary to change the setting of the feature switch 57 (FAX/TEL parallel connection switch). See page 51-52 for feature switch setting procedure.

What to do if you answer a fax call:

- If you use the handset of the fax machine, fax reception starts automatically. Replace handset.
- If you use a Touch-tone extension phone connected to the same line, you can use remote reception method to start fax reception without going to the fax machine. (Press [*] and the [#] firmly on the extension phone. See pages 32-33.) Remote reception will not work with pulse dialing phones.
- In any cases, pressing the [START] key on the SFX-33 will initiate fax reception.

What to do if you answer a voice call after the fax machine connects to the line:

When the line connects, the fax machine issues a set of simulated rings** and then switches into reception mode with a fax tone. To start a conversation with the caller, you must deactivate fax reception using remote reception method. Press [*] and the [#] firmly on the extension phone while simulated rings are provided. (pages 32-33).

Notes

* The fax machine is initially set to ring 5 times* before receiving a fax. Using the feature switch No. 07, you can change this ring delay setting - - how many times the fax machine (and your phones) should ring before turning into fax receiving mode - - to short ring or select from 1 to 11 regular rings. See page 51-52.

** The number of simulated rings that sound after the line is connected can be changed to no rings (position 00) or any number between 3 - 11 rings. Use the feature switch No. 09. If this switch is set to 00, the fax machine does not provide simulated rings, and answers callers with fax tone after the first set of rings.

[IMPORTANT] If you connect an answering machine to the fax machine, do not select the AUTO reception mode. Select the ANSWER mode. (page 31.)

Manual reception mode

Set to this mode if you use the fax machine mainly for fax transmission, and wish to receive faxes only with your initiation. Incoming faxes can be received only after you pick up the handset.

1. Lift the handset when the telephone rings.

   If the call is for a fax transmission (you hear an incoming fax tone), the fax machine receives incoming fax automatically when the feature switch No. 54 is set to ON (01).
   The switch is initially factory-set to ON (01).
   Replace the handset after initiating the reception.

2. When the conversation is complete, press [START].
   - Your caller can start fax transmission after hearing a fax tone.

3. Replace the handset.

   ** RECEIVING **

4. When reception is complete, a beep sounds.

   Jun. 26 '99 12:00

Note:

- If you have a noisy telephone line, the fax machine may not pick up the incoming fax signal and automatic receiving will not start. Press [START] key to initiate receiving.

Refer to the passage from Section 123.34 to answer questions 25–27.

124.34 Tenure of office; reduction, suspension, and removal; appeal

The tenure of every officer or employee in the classified service of the state and the counties, civil service townships, cities, city health districts, general health districts, and city school districts thereof, holding a position under this chapter of the Revised Code, shall be during good behavior and efficient service and no such officer or employee shall be reduced in pay or position, suspended, or removed, except as provided in section 124.32 of the Revised Code, and for incompetency, inefficiency, dishonesty, drunkenness, immoral conduct, insubordination, discourteous treatment of the public, neglect of duty, violation of such sections or the rules of the director of administrative services or the commission, or any other failure of good behavior, or any other acts of misfeasance, malfeasance, or nonfeasance in office. A finding by the appropriate ethics commission, based upon a preponderance of the evidence, that the facts alleged in a complaint under section 102.06 of the Revised Code constitute a violation of Chapter 102. of the Revised Code may constitute grounds for dismissal. Failure to file a statement or falsely filing a statement required by section 102.02 of the Revised Code may also constitute grounds for dismissal.

In any case of reduction, suspension of more than three working days, or removal, the appointing authority shall furnish such employee with a copy of the order of reduction, suspension, or removal, which order shall state the reasons therefor. Such order shall be filed with the director of administrative services and state personnel board of review, or the commission, as may be appropriate.

Within ten days following the filing of such order, the employee may file an appeal, in writing, with the state personnel board of review or the commission. In the event such an appeal is filed, the board or commission shall forthwith notify the appointing authority and shall hear, or appoint a trial board to hear, such appeal within thirty days from and after its filing with the board or commission, and it may affirm, disaffirm, or modify the judgment of the appointing authority.

In cases of removal or reduction in pay for disciplinary reasons, either the appointing authority or the officer or employee may appeal from the decision of the state personnel board of review or the commission to the court of common pleas of the county in which the employee resides in accordance with the procedure provided by section 119.12 of the Revised Code.

In the case of the suspension for any period of time, or demotion, or removal of a chief of police or a chief of a fire department or any member of the police or fire department of a city or civil service township, the appointing authority shall furnish such chief or member of a department with a copy of the order of suspension, demotion, or removal, which order shall state the reasons therefor. Such order shall be filed with the municipal or civil service township civil service commission. Within ten days following the filing of such order such chief or member of a department may file an appeal, in writing, with the municipal or civil service township civil service commission. In the event such an appeal is filed, the commission shall forthwith notify the appointing authority and shall hear, or appoint a trial board to hear, such appeal within thirty days from and after its filing with the commission, and it may affirm, disaffirm, or modify the judgment of the appointing authority. An appeal on questions of law and fact may be had from the decision of the municipal or civil service township civil service commission to the court of common pleas in the county in which such city or civil service township is situated. Such appeal shall be taken within thirty days from the finding of the commission

13

25. An employee can be suspended only as provided in section 124.32, and for
    A. Incompetency
    B. Inefficiency
    C. Dishonesty
    D. Immoral conduct
    E. All of the above and other behaviors listed in paragraph 1, section 124.34.

26. If an employee is fired for disciplinary reasons, he may appeal the decision to the:
    A. Local Supreme Court.
    B. Closest federal court.
    C. Municipal court in his home town.
    D. Court of common pleas in his county.
    E. Commission.

27. Any employee affected under section 124.34 must file an appeal:
    A. In writing within ten days.
    B. In writing within three days.
    C. Within ten days.
    D. Within three days.
    E. Within 30 days.

Refer to the People Who Travel passage on p. 243 when answering questions 28–30.

28. How is this document used in the workplace?
    A. In an employee travel policy manual
    B. As a college textbook
    C. For hotel management training
    D. In an employee travel procedures manual
    E. For a business report

29. Name a type of business that might find the information in this passage particularly useful in raising profits.
    A. Airplane manufacturers
    B. Travel agencies
    C. Taxi cab companies
    D. Tour guides
    E. Small bed and breakfast establishments

30. When creating a marketing plan, a manager should use the information in this passage to identify:
    A. The needs and wants of the customers the company wants to target.
    B. Establish marketing goals.
    C. Hire housekeepers.
    D. Target military travelers.
    E. Both A and B.

People Who Travel

A pricing strategy is a pattern or plan that integrates pricing decisions into the overall framework of marketing goals. Many factors make up the overall strategy of a lodging facility. The hotel sales and marketing department is responsible for filling rooms and selling space 365 days of the year. In order to do so, the Director of Sales and Marketing must create a marketing plan. This plan is designed to reach the largest number of potential clients who will select the property for business, leisure travel or bring groups to the hotel.

The offerings of the property must meet the need of the client before a sale can be made. The director must be familiar with the needs and wants of all market segments and spend the greatest amount of time selling where there is a perfect match of needs and offerings between buyer and seller.

Market segments can be divided as follows:

INDIVIDUAL TRAVEL

1. **Family/Leisure Travel** - people who travel by themselves or with friends for the purpose of leisure and groups of people (10 or more) who travel for leisure purposes such as a tour, vacation, booster club etc. The sales executive sells to this market through advertising, public relations and personal selling to travel agents, tour operators and wholesalers.

2. **Government Travel** - a specialized market governed by strict per diem rate requirements. People who travel for government business: Usually government offices, schools and universities, military personnel or people who work for companies that are contracted to do business with the government.

3. **Senior Citizen Travel** - retired people or people who are age 65 and over, or American Association of Retired Persons (AARP) members who travel for leisure or business. Hotels usually give seniors a discount on rack rate.

BUSINESS TRAVEL

1. **Individual Corporate or Business Travel** - people who travel on his or her own or with associates for the purpose of business. Again, the methods of selling are advertising, public relations and personal selling to corporate travel agents, corporate traffic managers and to corporate travelers directly.

The business travel market is one of the most important market segments providing year round base business. Each hotel property must find a way to influence business travelers to use its hotel. Location can be a prime factor, as well as, quality of service. Good personal experiences from travelers bring repeat business and referrals. If one traveler has a pleasant stay, he/she will recommend the hotel to other people. Quality of service is just as important as the availability of a clean, comfortable room. A writing desk, remote control television, good lighting and possible computer availability are additional selling

Targets for Learning: Reading for Information
Learner's Response Sheet

Name _____

Date _____ Circle one: Pretest Post-test Other _____

Instructions: Write the letter of the correct answer on the appropriate line below.

Level 3

1. _____
2. _____
3. _____
4. _____
5. _____

Level 4

6. _____
7. _____
8. _____
9. _____
10. _____

Level 5

11. _____
12. _____
13. _____
14. _____
15. _____
16. _____
17. _____

Level 6

18. _____
19. _____
20. _____
21. _____
22. _____
23. _____
24. _____

Level 7

25. _____
26. _____
27. _____
28. _____
29. _____
30. _____

Learner's Assessment Score Summary Sheet

Instructions for the Learner

Use the chart on the next page and follow the listed steps to determine your current Reading for Information skill level.

1. Place a "✓" in the appropriate space for each *correct* response.

2. Place an "**X**" in the appropriate space for each *incorrect* response.

3. Tally the number of "**X**"s in each section (i.e., Level 3, Level 4, and Level 5) and record the total in the boxes labeled *Total Xs*.

4. Focusing on the *Total Xs columns*, start at Level 3 and read downward until you locate the **first** box in which you have written the number 2 or above. Put an asterisk (*) in that box. If your asterisk is beside Level 6, skip to instruction #6.

5. Find the *Total* box located **before** the one you marked with an asterisk. Circle it. This is the Reading for Information level at which you should begin instruction. (This level corresponds to your Work Keys Reading for Information level.)

6. Find your Reading for Information level in the list located beneath the chart. Place a "✓" beside your level.

Now you're ready to begin your Reading for Information instruction. Enjoy the learning!

Learner's Assessment Score Summary Sheet

	(Insert a ✓ or an X)	Total Xs		(Insert a ✓ or an X)	Total Xs
LEVEL 3			**LEVEL 6**		
Question 1			Question 18		
Question 2			Question 19		
Question 3			Question 20		
Question 4			Question 21		
Question 5			Question 22		
LEVEL 4			Question 23		
Question 6			Question 24		
Question 7			**LEVEL 7**		
Question 8			Question 25		
Question 9			Question 26		
Question 10			Question 27		
LEVEL 5			Question 28		
Question 11			Question 29		
Question 12			Question 30		
Question 13					
Question 14					
Question 15					
Question 16					
Question 17					

My Reading for Information level is (check one):

_____ **Below Level 3.** Starting at *Improving to Level 3* will best meet my current learning needs.
_____ **Level 3.** Starting at *Improving to Level 4* will best meet my current learning needs.
_____ **Level 4.** Starting at *Improving to Level 5* will best meet my current learning needs.
_____ **Level 5.** Starting at *Improving to Level 6* will best meet my current learning needs.
_____ **Level 6.** Starting at *Improving to Level 7* will best meet my current learning needs.

Answers to Reading for Information Assessment

Caution! The assessment will give instructors and learners a general placement level. However, it should be used only for instructional placement or practice purposes, because it has not been field-tested for statistical validity and reliability.

	Answer	Skill Category
Level 3		
1.	A	#1 and #2
2.	C	#1
3.	B	#2 and #3
4.	B	#2
5.	E	#3
Level 4		
6.	A	#3
7.	C	#1
8.	E	#2
9.	A	#4
10.	D	#3
Level 5		
11.	D	#1
12.	E	#2
13.	C	#1 and #2
14.	A	#2 and #3
15.	B	#2 and #4
16.	B	#3
17.	A	#4
Level 6		
18.	C	#2 and #3
19.	A	#1 and #2
20.	D	#2
21.	E	#1, #2, and #3
22.	B	#2, #3, and #4
23.	A	#4
24.	C	#1 and #4
Level 7		
25.	E	#1
26.	D	#1, #2, and #3
27.	A	#1, #2, and #3
28.	C	#4
29.	B	#4
30.	E	#1 and #4

Reading for Information Summary Sheet

Instructions:

1. Write learners' names down the column on the left.
2. In the first column after each name, write each learner's Reading for Information score, according to the pretest.
3. Save the spaces in the next column for post-test scores.
4. Across the top of the chart, in the spaces to the right of "Work Keys Post-test Level," enter the Reading for Information skills that learners should be able to demonstrate.
5. Use the spaces below the Reading for Information skills to record learners' performance on the learning activities and practice problems in *Targets for Learning*. You may wish to record the learners' skill levels using the following notations in the appropriate spaces:

   IN = learner can use Reading for Information skills Independently
   WA = learner can use Reading for Information skills With Assistance
   CN = learner Can Not use Reading for Information skills.

Learner's Name	Work Keys Pretest Level	Work Keys Post-test Level									